Youth Support

YSCIS User Manual for Youth Support Services

December 2018

Queensland Government

Purpose of this document

This User Manual provides users within funded service organisations with information on how to access and use YSCIS.
YSCIS is based on the Infoxchange SRS product. Guidance for functionality which has not been specifically tailored for YSCIS is supported by Online Help accessed from within YSCIS.

For matters of practice, please refer to the following resources available at

https://www.csyw.qld.gov.au/youth/youth-support-services

- The Practice Guide for Youth Support Services
- The Youth Wellbeing Assessment Common Assessment Tool and
- The Youth Support Frequently Asked Questions

You may also email any queries to YouthInvest@csyw.qld.gov.au

ANONYMITY OF CLIENT DATA

The screenshots displayed in this document are taken from a test or training environment, using fictitious data.

Within the live production environment, YSCIS is managed through Infoxchange with DCSYW (Department of Child Safety, Youth and Women) only receiving reports on de-identified data.

DISCLAIMER

This User Manual reflects the functionality of the system as at December 2018. As enhancements and updates are made to the Youth Client Information Management System (YSCIS), the content of screens and functionality may differ from that represented in this document.

Table of Contents

1 About YSCIS

Youth Support Client Information System (YSCIS) is the online client management system developed in partnership with Infoxchange, and funded by the Department of Child Safety, Youth and Women to support service delivery by Youth Support services. YSCIS integrates tools and performance reporting to streamline the capture of reliable data for managing service delivery and evaluating the outcomes achieved for young persons.

To access YSCIS you will need:

- Internet connection
- Internet browser: Infoxchange supports the three most recent versions of Internet Explorer, as well as the latest versions of Chrome and Firefox.

1.1 Logging into YSCIS

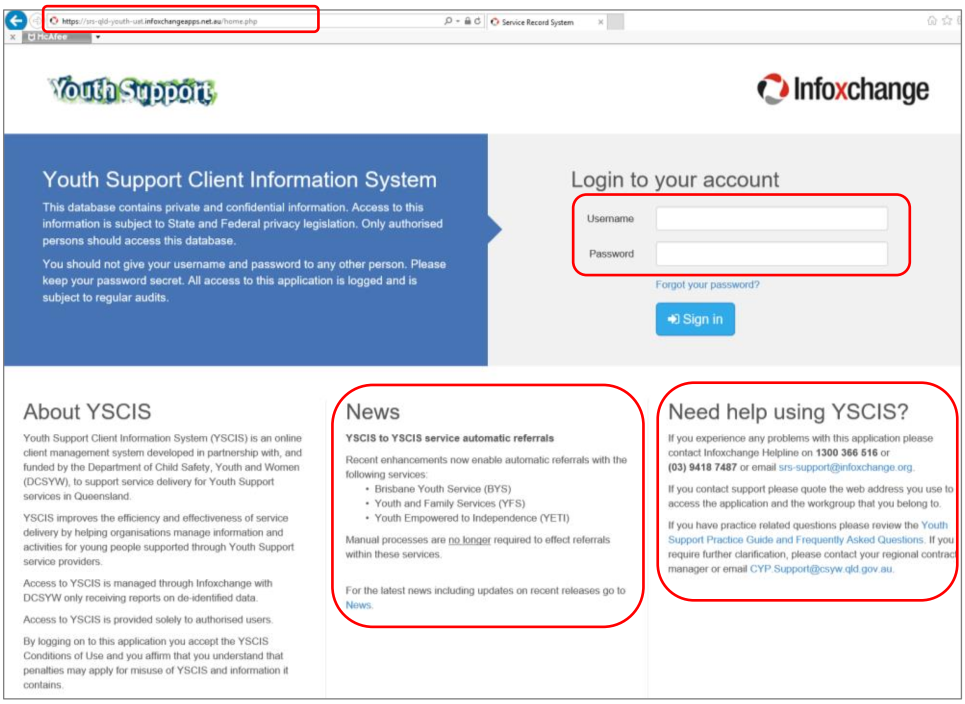
1. Type the URL https://srs-qld-youth.infoxchangeapps.net.au into the browser. The landing page, as below, will appear.

2. Login using your unique username and password.
Certain parameters need to be completed when you log in for the first time. These are detailed in the section Logging in for the first time.

- You have 4 attempts to enter the correct username and password. On a 5th unsuccessful attempt, your user account will be blocked for about an hour. Your Coordinator (or the Infoxchange HelpDesk) can re-set your account.
- User accounts are also blocked if you have not logged in for 6 weeks or more.
- YSCIS Coordinators can reset passwords and unblock blocked users.

3. The **News** section will keep you informed of any updates for the Youth Support Program Team and any software updates.

4. Details of support options are listed under the '**Need help using YSCIS?**' heading.



1.2 Logging in for the first time

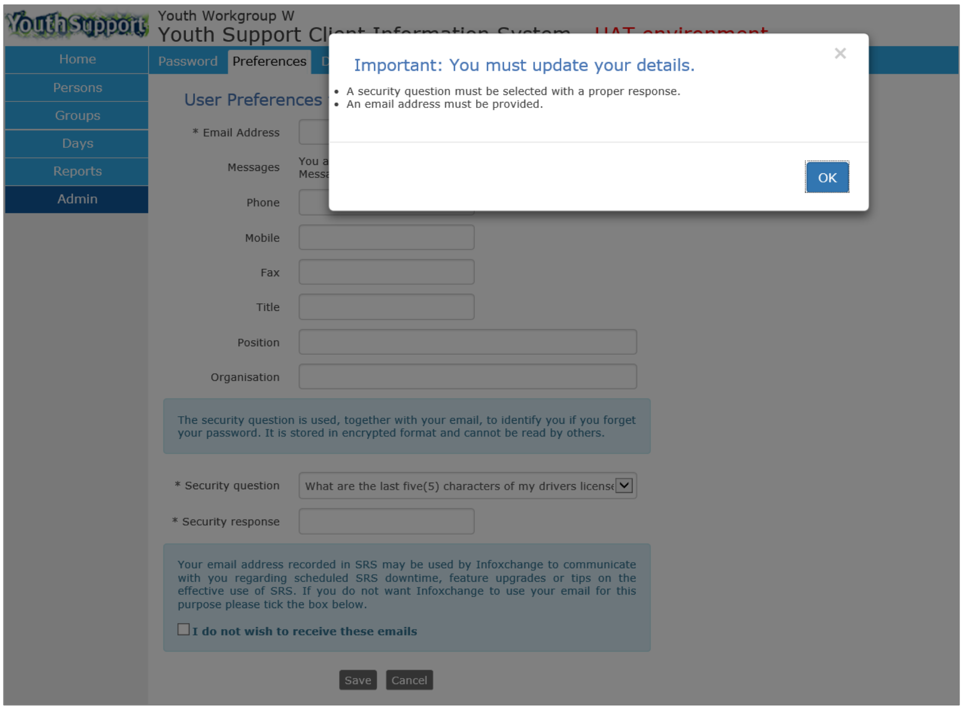
When you log in for the first time, you may be asked to change your password. This is located on the **Admin** Page, **Password** tab. We recommend that you change your password to something easy to remember. Refer to section Change Password for more information.

» Your YSCIS Coordinator will set you up with a username and a password to enable you to access YSCIS.

» Username must be unique within YSCIS.
Recommend Firstname.Surname (e.g. John.Dough)

» Passwords must be a minimum of 10 characters and contain 1 upper case letter, 1 lower case letter, a number and a special character.

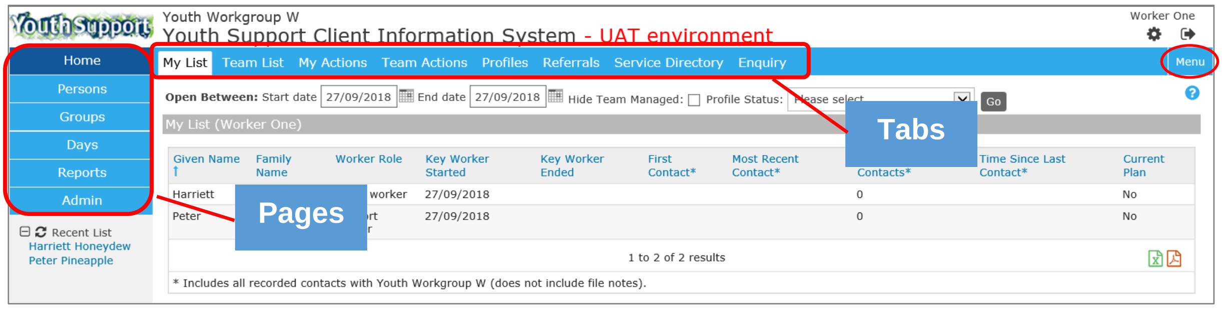
When logging in the first time, you will also be asked to update your security questions and email address – located on the **Admin** Page, **Preferences** tab.



This information helps to identify you within the system. **You will be prompted to update these preferences each time you login until you complete these items.**

1.3 Navigating YSCIS

Once you have logged into YSCIS, the **Home** Page, **My List** tab displays as the default.



Each screen is made up of 3 areas:

- Pages – 6 options on the left-hand side
- Tabs – appear across the top for each Page
- Workspace area – the centre of the screen.

Pages are grouped according to theme:

Home:	Range of worker tools + **Enquiry** form
Persons:	Search for clients and manage client records
Groups:	Manage data related to work with groups of clients
Days:	Enter or view data related to a particular day/date
Reports:	Request, generate and view reports
Admin:	User preferences, documents and YSCIS Coordinator functions.

Each page has multiple Tabs. Tabs allow the user to carry out particular functions within the selected page. The Menu icon Menu also contains the list of Tabs for each Page.

Within your YSCIS workgroup, users are assigned an access profile of **Coordinator** or **Normal** user.
Please note: Some tabs and fields within various templates are only available to those users with **Coordinator** access profile.

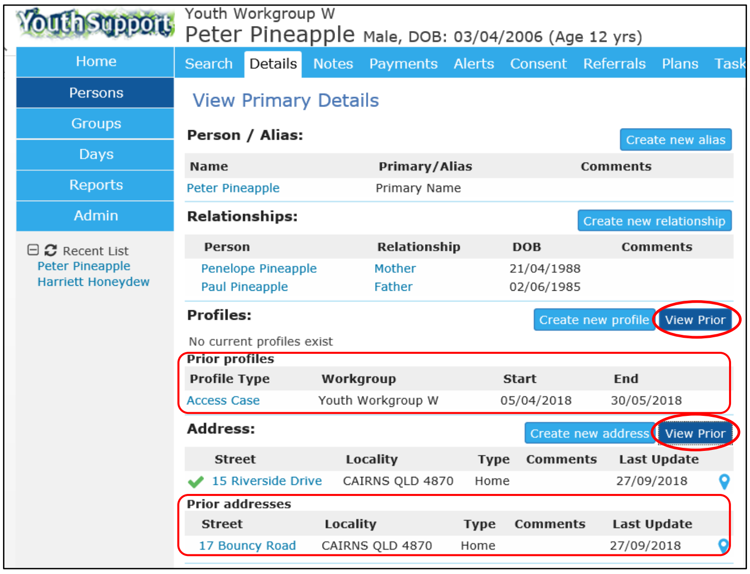
1.4 Viewing Prior Records

Data in YSCIS should not be deleted unless it was incorrectly entered. If information is no longer current or work has been completed, simply record the date the record stopped being current (e.g. address, contact details) or was completed (e.g. Profile/Case is closed). This will close the record but not delete it. It will be retained and able to be viewed /accessed from the **View Prior** button. Simply create a new record to reflect the current / new activity.

This **View Prior** feature occurs throughout YSCIS – the screenshots below provide an example of how it appears.

On the client record below, the **View Prior** button appears for Profiles and Address – indicating there are historical records for both of these.

By clicking on the **View Prior** button, those previous records are displayed for viewing:



1.5 Toggle for access to Person records

On the left-hand side of your screen, located underneath the Pages, there are 3 toggle options to display recent Person records – for easy access:

- **Recent List**: displays the 10 most recent Person records you have accessed
- **My List**: displays the Persons for which you are listed as a Key Worker
- **Team Managed**: displays the Persons where Team Managed has been selected as Key Worker.

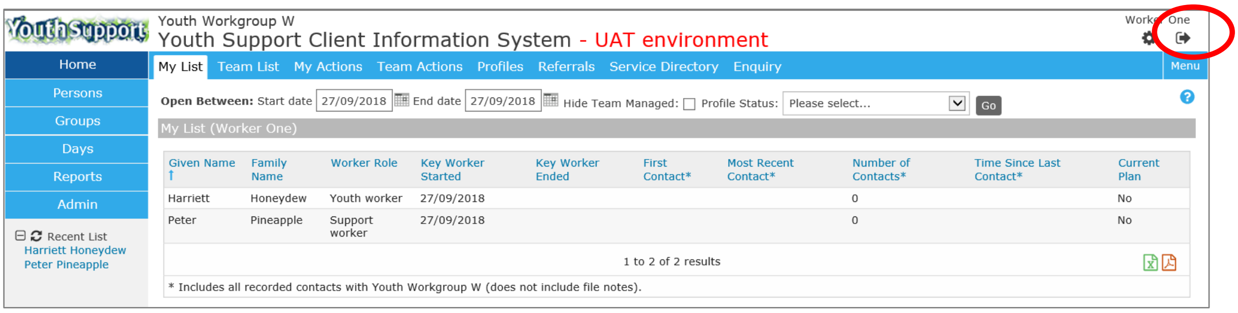
Simply …

- click the toggle icon to select your required display
- click on the blue name to open that Person record
- click the box to expand or hide records.

1.6 Logging Off

Log off via the log out icon on the top at the far right of the screen. Simply click to log out.

Users should log out as soon as they have completed their work within YSCIS.

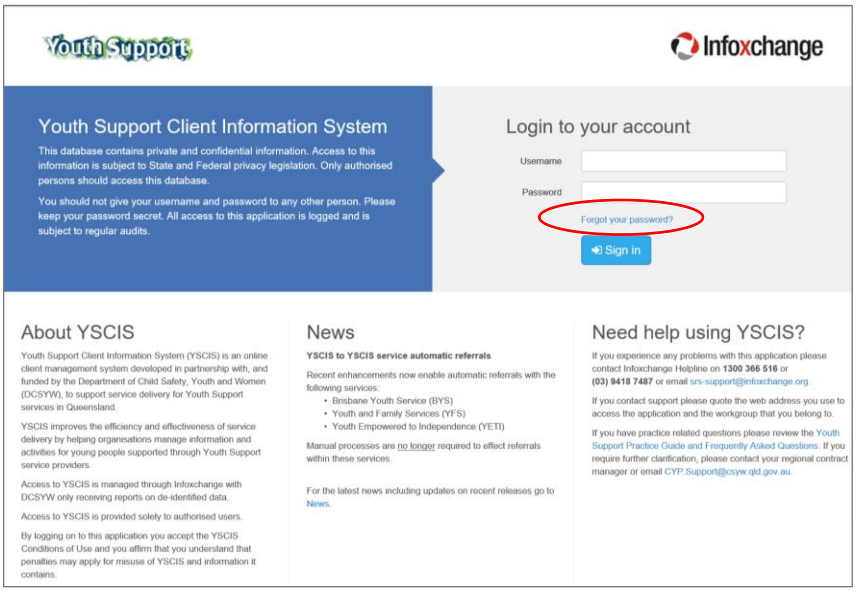


1.7 Forgotten password

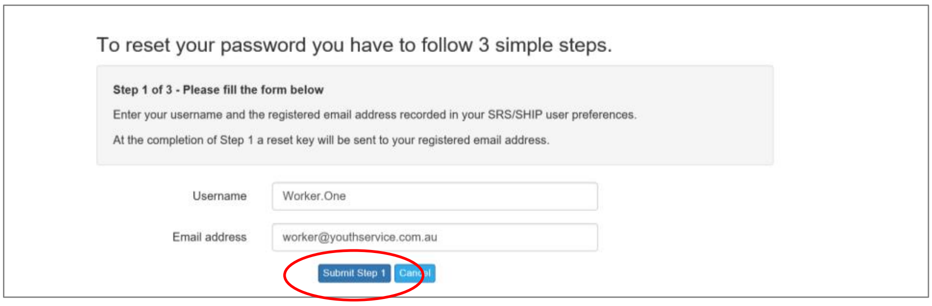
After you have logged in for the first time and have completed your **Preferences** (recorded your email address), the 'Forgot your password?' link on the landing page is of great help, if you have forgotten your password.

Note: If you haven't recorded your email address, you will need to contact your YSCIS Coordinator to reset your password.

1. Select **Forgot your password** to reset your password.

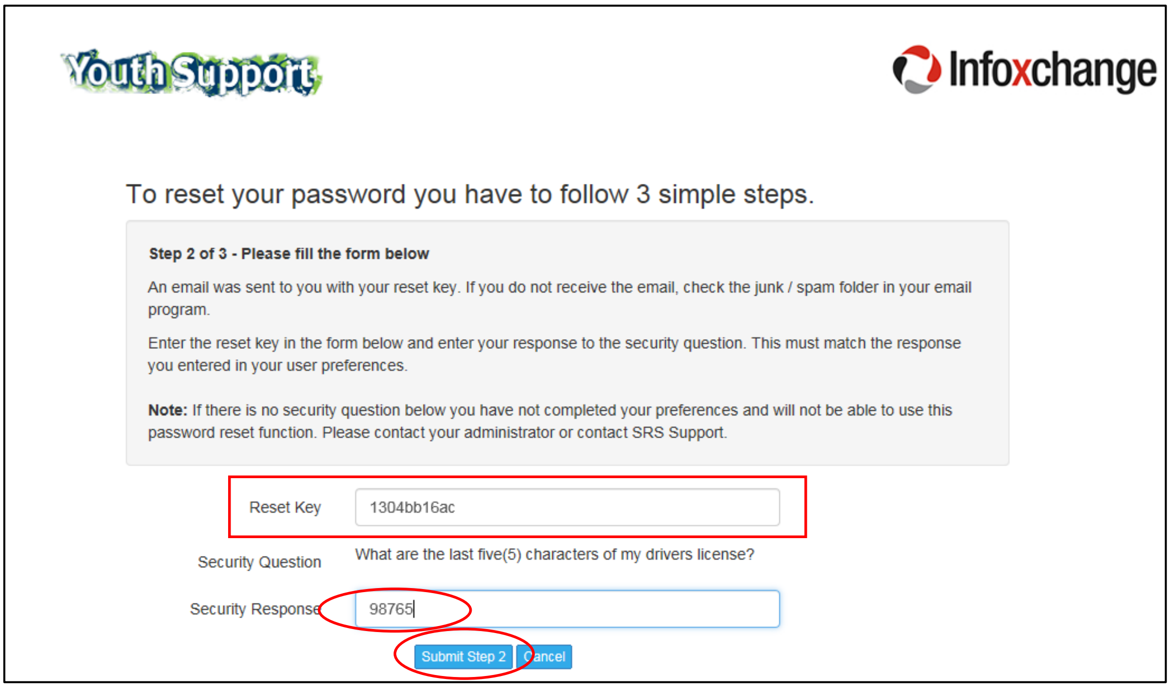


2. Enter your username and the recorded email address registered. Select **Submit Step 1**



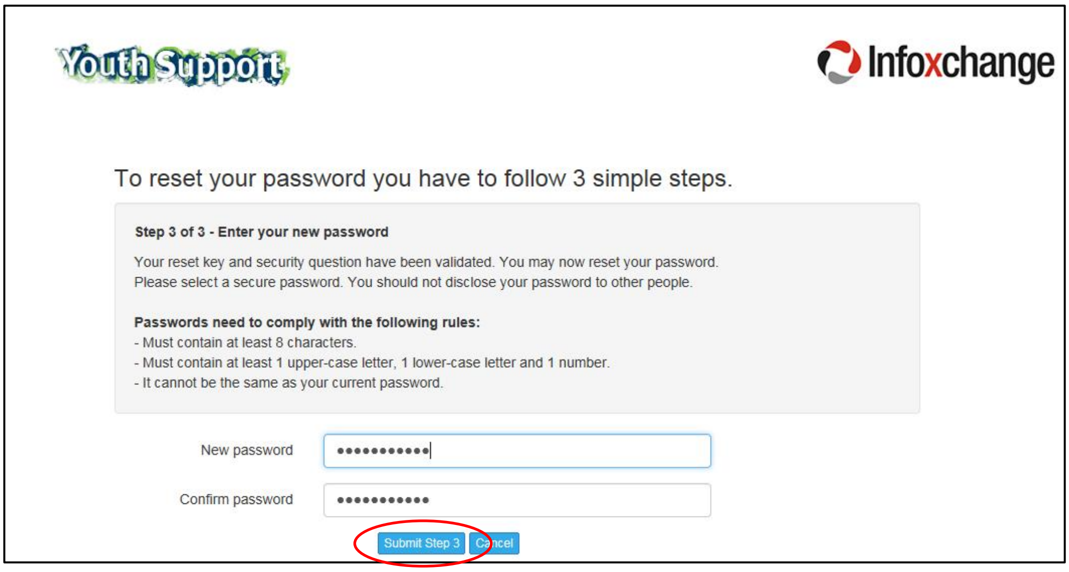
An email containing a reset key is sent to the registered email address.

3. Copy the reset key from your email and paste it into the **Reset Key** field and answer the security question. Select **Submit Step 2**



4. Enter your **new** password

Note: Your password must be at least 10 characters long: containing 1 upper case letter, 1 lower case letter, 1 number and 1 special character. Select **Submit Step 3**

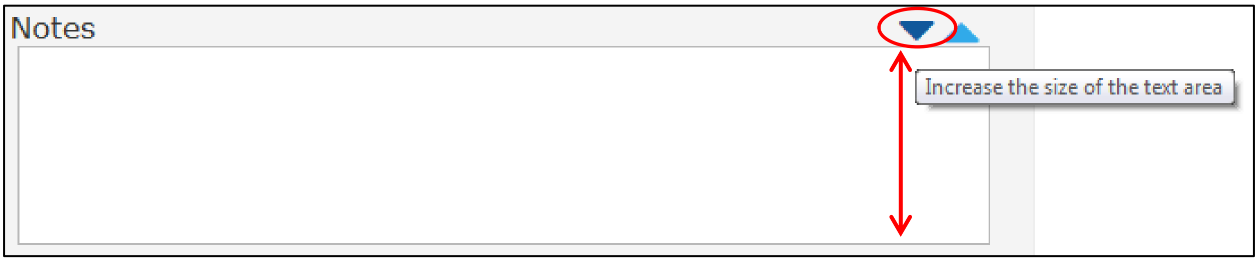


5. The following screen will display. Select **Login Page** and enter your new password to log-in to YSCIS.

1.8 Increasing/Decreasing the size of text fields

Some free text fields are able to expanded and decreased in size. This allows you to view more/less text as desired.

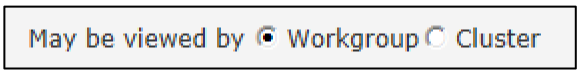
1. To increase the size of a free text field click the icon to 'push' the bottom of the field down the page hence increasing the amount of space available for text.



1.9 Seeking help for standard SRS features

The information in this User Manual targets functionality specifically tailored for the Youth Support Program. There are several functions, features and terminology that have not changed from the Infoxchange SRS product. For guidance on using these features, use the Help icon located in the top right corner of the screen. This will take you to the relevant location on Infoxchange's support site.

Workgroup vs Cluster: You may notice the following wording appearing on certain forms within YSCIS:



The terms Workgroup and Cluster pertain to different structure options within the SRS product. In YSCIS, your service outlet (funded under the Youth Support Program) is established in a 1:1 relationship – each service workgroup is its own workgroup and its own cluster. These buttons do not have any relevance for managing your data.

2 Home Page

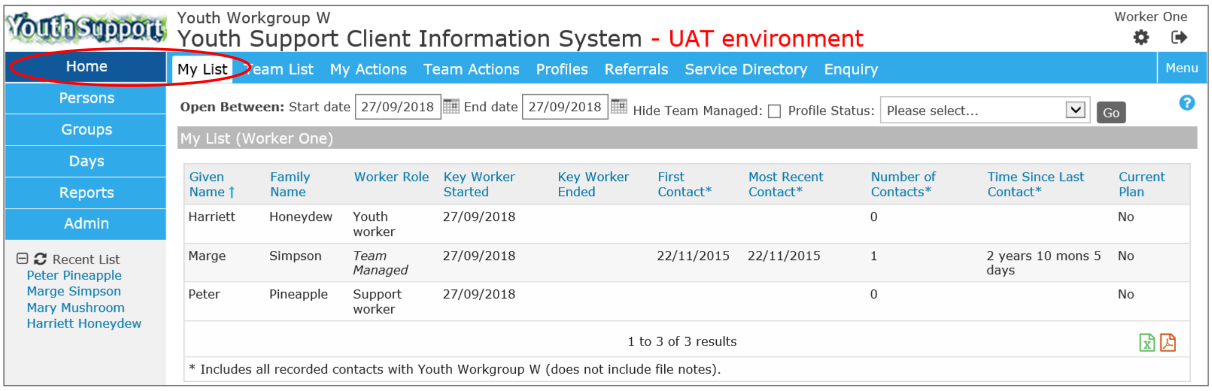
This section provides an overview of the various **Tabs** accessed from the **Home** page.

2.1 My List

When you log-in to YSCIS, it opens on the **My List** tab.

The **My List** tab displays clients for whom you have been allocated as a ***Key Worker*** (from the **Persons** page, **Details** tab).

On the **Home** page, select the **My List** tab:

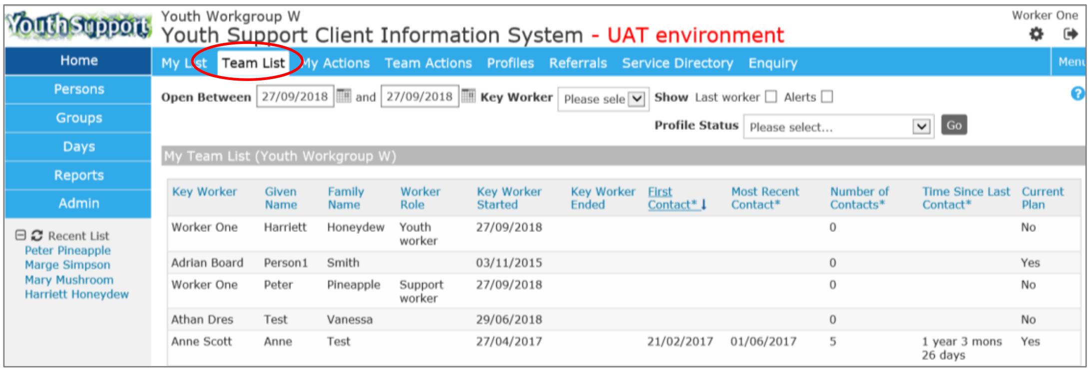


The following options can be used to customise your view:

- By clicking the calendar icon and altering the Start date and End date, you can filter data by date.
- You can exclude those clients managed by the entire Workgroup by clicking the Hide Team Managed box.
- Using the drop down menu allows you to view clients by a particular Profile Status, which will be displayed once you click GO.
- To sort the list of persons, click on the Given Name or Family Name blue column headings.
- Click Export List to export the data currently displayed to a Microsoft Excel spreadsheet.
- Clicking on the person’s name directs you to the person’s record.

2.2 Team List

The **Team List** tab is used to view the list of clients allocated by Key Worker within your Workgroup.



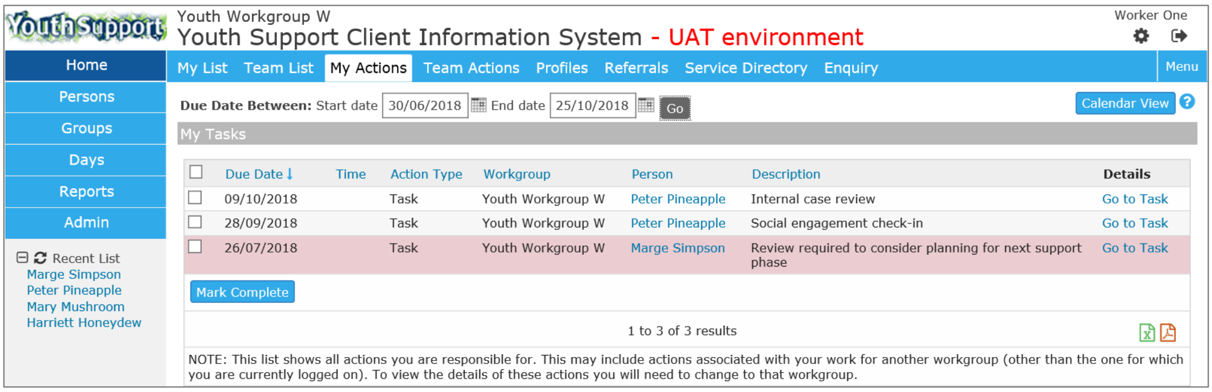
The following options can be used to customise your view:

- By clicking the calendar icon and altering the displayed date range you can filter data by date.
- You can show additional details such as Last Worker, existing Alerts and Profile Status by clicking the options at the top of the form.
- To sort the list of persons, click on the Worker Name, Given Name or Family Name blue column headings.
- Click Export List to export the data currently displayed to a Microsoft Excel spreadsheet.
- Clicking on the person's name directs you to the person's record.

2.3 My Actions

The **My Actions** tab provides a quick way for you to check on any tasks, alerts, plans, document reviews and any other actions that have been allocated to you.

My Actions lists all of your actions and tasks that are due shortly or those that are overdue. Overdue tasks are highlighted with a pink background.



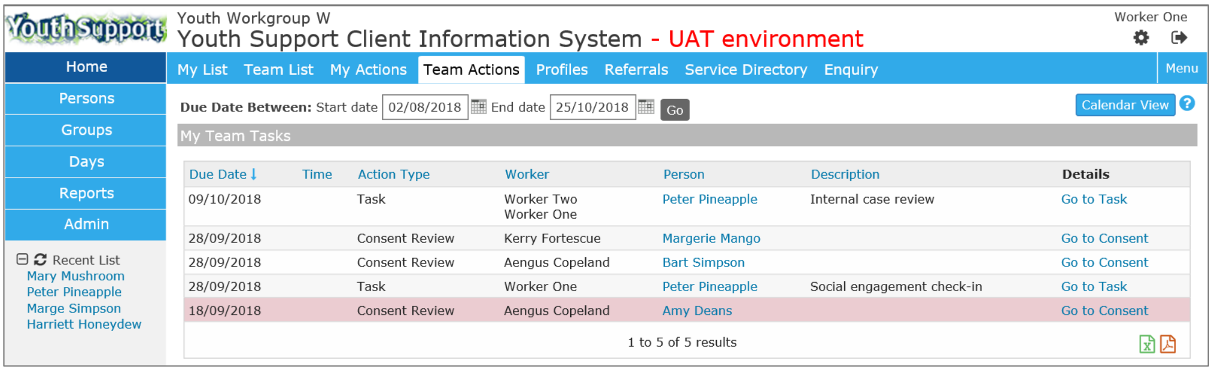
The following options can be used to customise your view:

- The default setting displays actions that are due in the next four weeks or were due in the past six weeks that are yet to be completed or closed. To alter the period you are viewing, enter dates into the Start date and/or End date fields, or use the calendar icon to specify a period. Click GO.
- To sort the list of tasks, click on the Due Date or Action Type blue column headings.

- Clicking on the blue Person's name directs you to the person's record
- Go to Task directs you to the individual action.

2.4 Team Actions

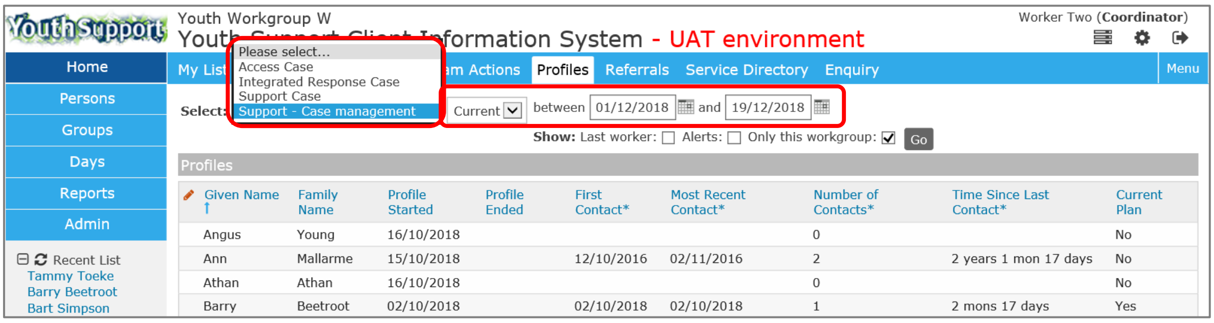
The **Team Actions** tab is used to view the list of actions that have been allocated to workers within your workgroup.



Data can be viewed with the same options as available on the **My Actions** tab.

2.5 Profiles

The **Profiles** tab on the **Home** page lists is very helpful in enabling you to identify Cases/profiles that are Current, Opened or Closed for specified date ranges.



Select your required Case/Profile type, <u>then</u> select Current, Opened or Closed from the drop-down list <u>and</u> specify the date range required. Click **Go**.

The following options can be used to customise your view:

- Profile information can be filtered by profile type and profile status:
- By clicking the calendar icon and altering the Start date and End date, you can filter data by date.
- You can also display Last worker and Alerts information by clicking these fields.
- You can limit the profiles to only those within the current workgroup by selecting Only this workgroup.
- To sort the list of profiles, click on the Given Name, Family Name or Profile Started blue column headings.
- Click Export List to export the profile data currently displayed to a Microsoft Excel spreadsheet or pdf.
- Clicking on the blue person's name directs you to the person's record.

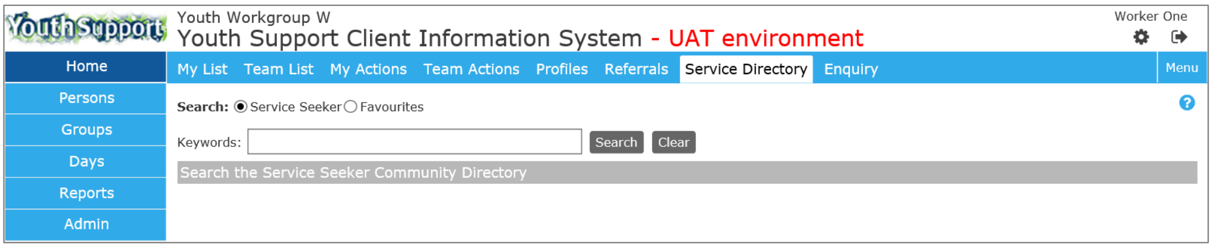
2.6 Referrals

This tab is used to manage referrals *received from* other Youth Support services and provides a central list of referrals recorded for your clients (i.e. sent to other services – within and external to the Youth Support Program).

For specific guidance regarding the **Referrals** tab, refer to Chapter 10 Referrals

2.7 Service Directory

The **Service Directory** tab accesses the Service Seeker directory maintained by Infoxchange. This is a separate application external to YSCIS. Using this is optional.



If you have any questions regarding the Service Seeker database, click the Help icon or contact the Infoxchange Help Desk.

2.8 Enquiry

For guidance regarding the **Enquiry** tab, refer to Chapter 13 Enquiries

3 Persons Records

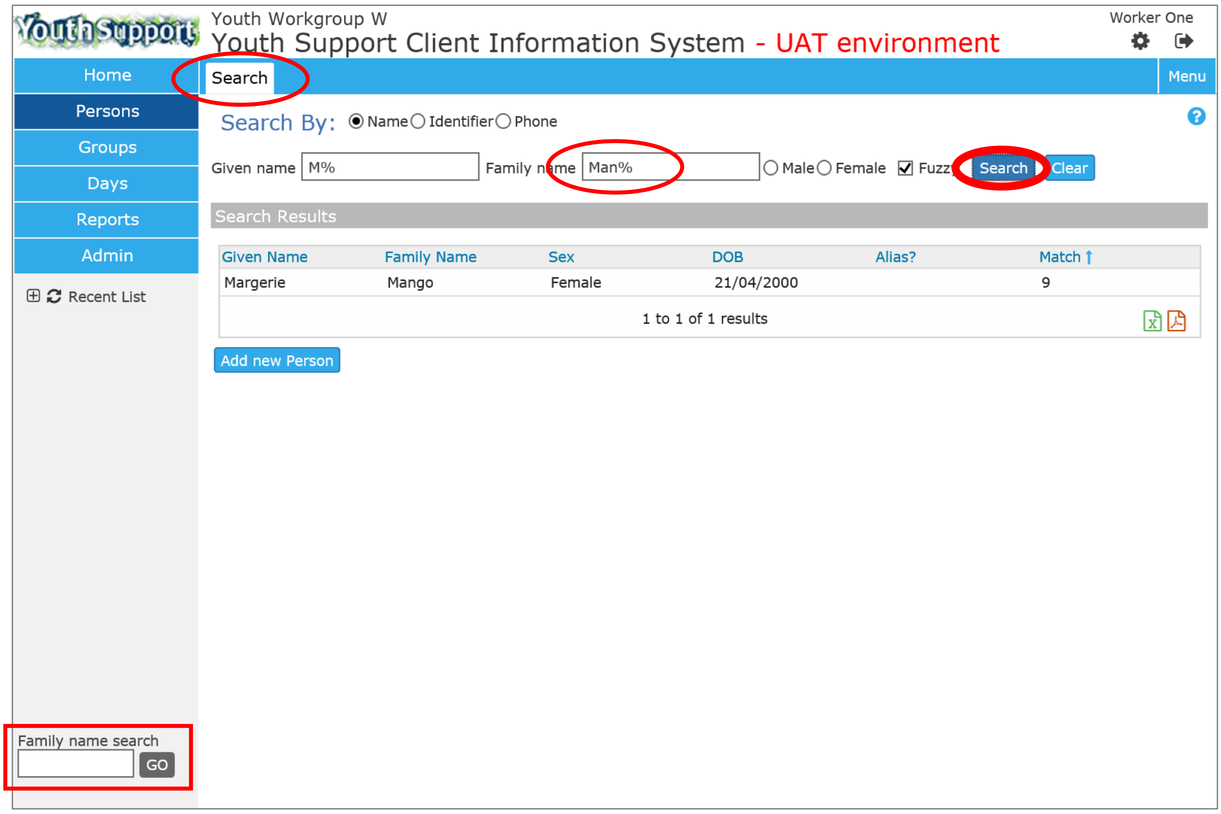
3.1 Searching for a Person

- Within YSCIS, a 'person' includes clients or person related to a client
- To maintain the accuracy of your data by ensuring duplicate records for Persons are not created, you can only add new Person records after you have done a search to ensure the client doesn't already exist in your workgroup.

You can search for a person in 2 places:

1. via the **Persons** page and using the **Search** tab. Using the search tab allows you to enter the first name, surname and gender of the client.

2. using the **Family Name** search box on the bottom left of the screen;



Fuzzy searching allows you to search for clients with names that are a close match, or sound similar, to the one you typed. It is highly recommended to always select Fuzzy searching because of the variety in the way people spell names. For example a search of 'Doe' will also pick up 'Dough'

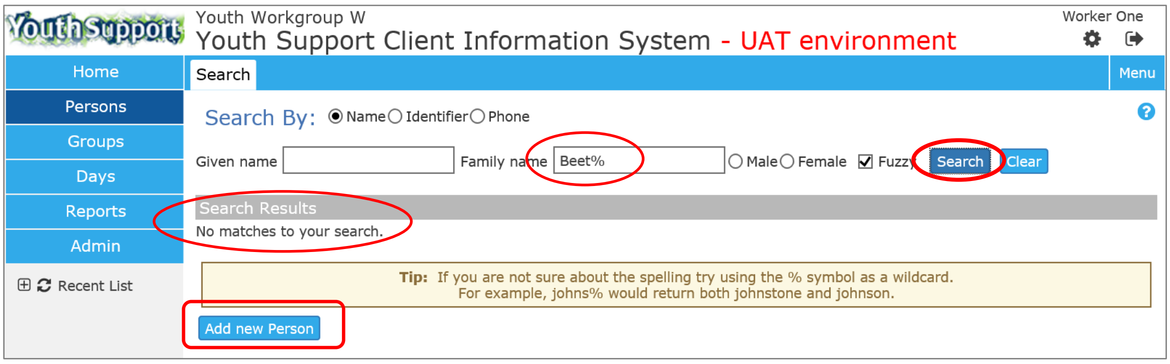
The system is capable of wildcard searching. A **wildcard** is a character (either ***** or **%**) that can be used as a substitute for characters in a search, which greatly increases efficiency and flexibility. For example, Family name "%son" will return a list of all persons whose surname ends with 'son'.

Some example wildcard searches include:

- W* or W% will search for names starting with "W"

3.2 Add a Person

1. On the **Persons** page, **Search** tab, enter the criteria for the person you are searching for. Click **Search**.



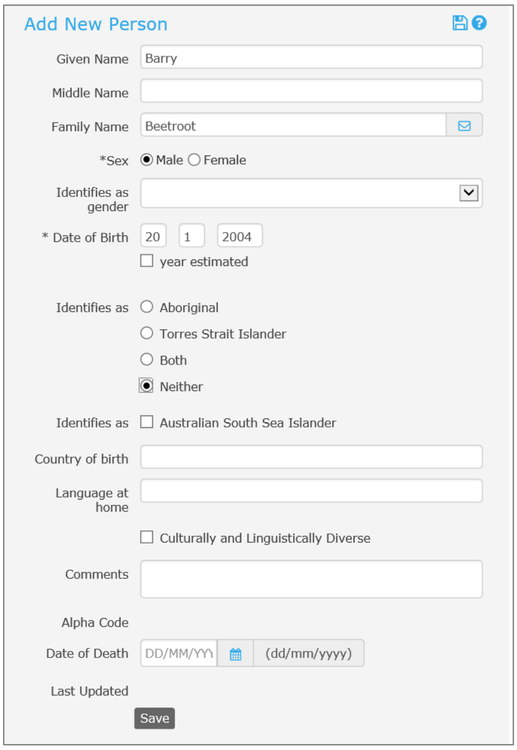
Where no record is found, 'No matches to your search' message will be displayed.

Click **Add new Person** to create a record.

NOTE:

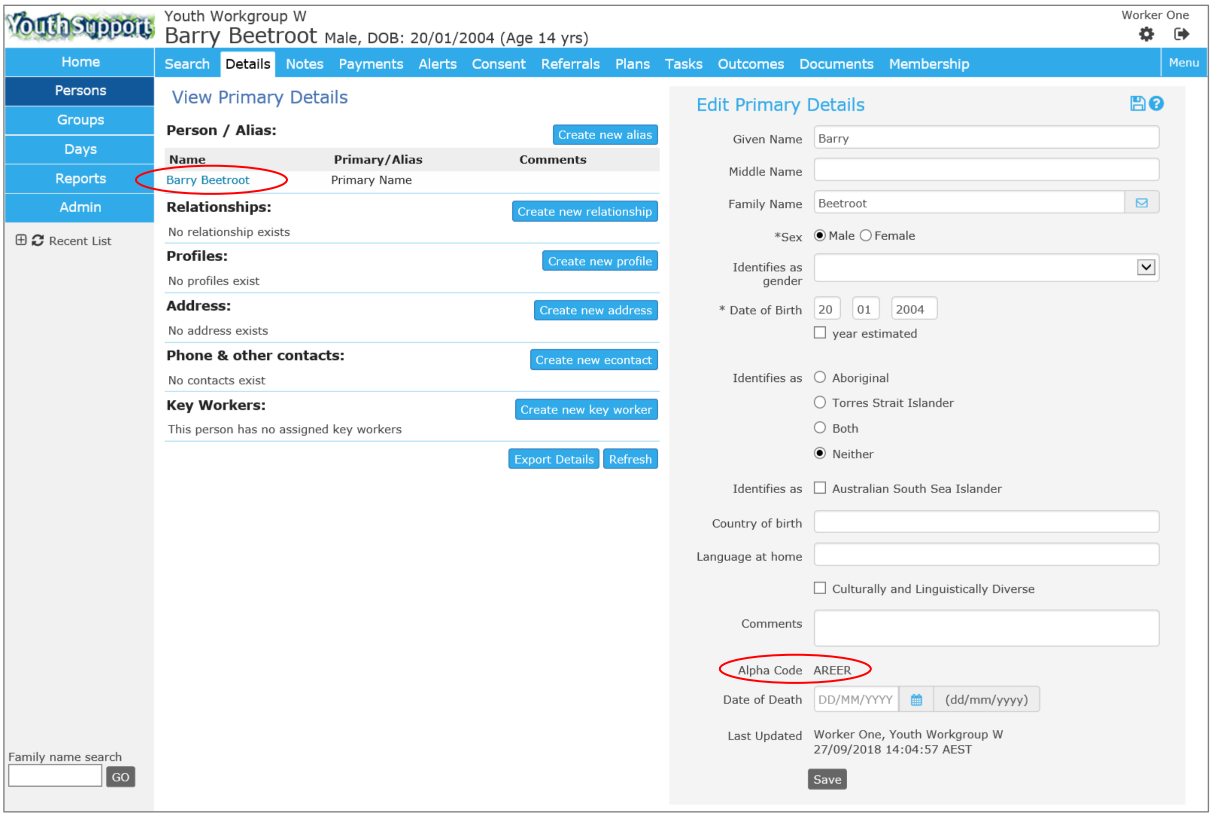
Throughout the steps to create a Person record, a warning message/s will display advising that Date of birth and Consent are required to be recorded. These will continue to display until the consent on the **Persons** page, **Consent** tab and *Date of birth* on the **Persons** page, **Details** tab, **Edit Primary Details** form, are recorded.

2. Enter as much information about the client as possible. Sex and Date of Birth are mandatory fields (*). If the exact date of birth is unknown, the user can enter a year and tick the 'year estimated' box.

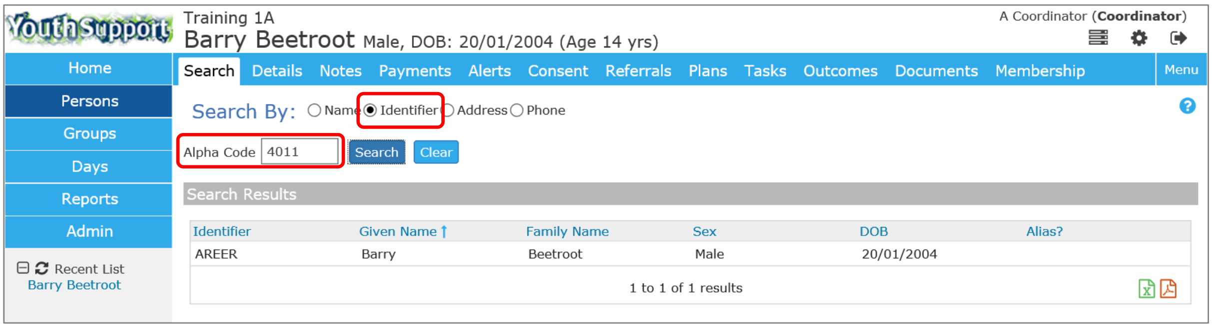


3. Click **Save** or select the 💾 icon in the top right of the form.

4. The Person record is created – the **Details** tab is the default view.
It can be edited at any time by updating the details and clicking **Save.**



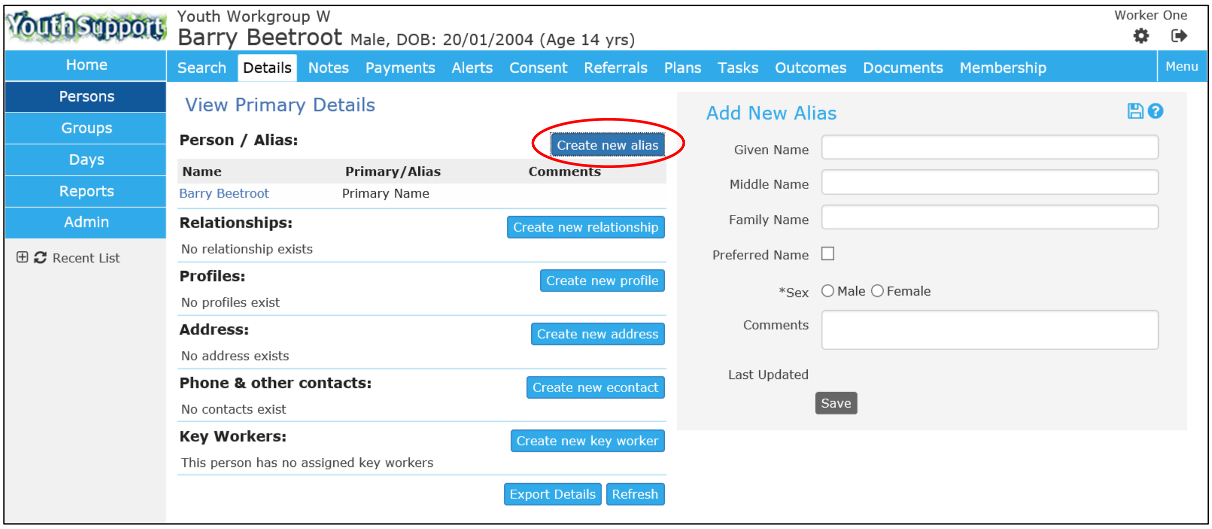
YSCIS auto-assigns an Alpha Code and an ID number (visible by hovering over the blue Person name) to each Person record. These identifiers can be used in the *Identifier* Search option (both codes can be entered into the Alpha Code field) and may display in some Lists.



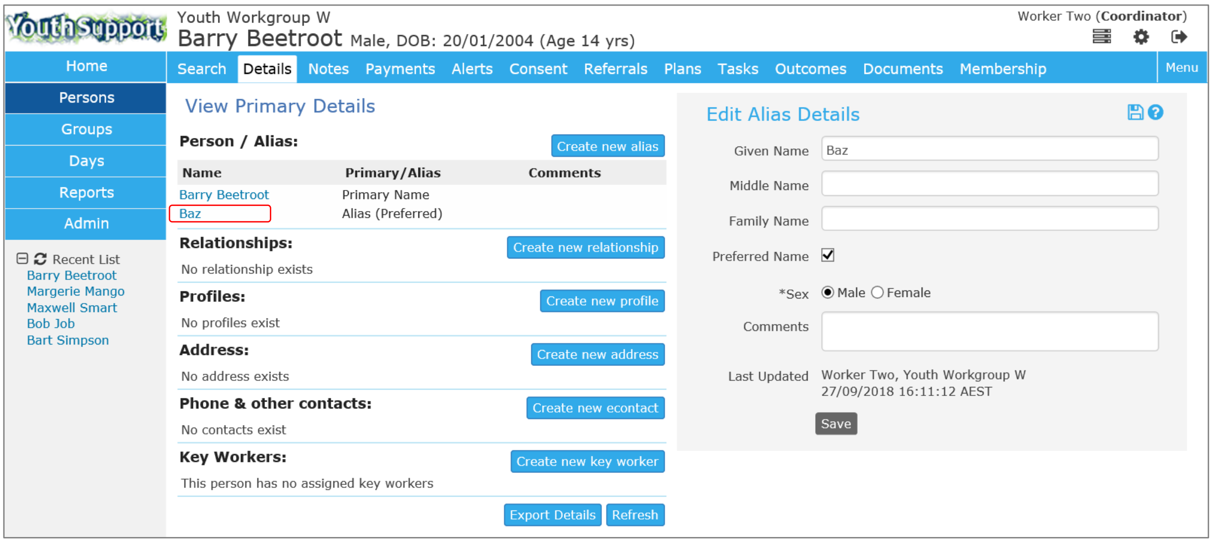
The following sections step through completing the segments on the **Details** tab.

3.3 Create Alias

1. From the **Persons** page, **Details** tab, select **Create new alias**



2. Record relevant details in the Add New Alias form. Click **Save**.
Note: Sex must be recorded for an Alias to assist in searching.

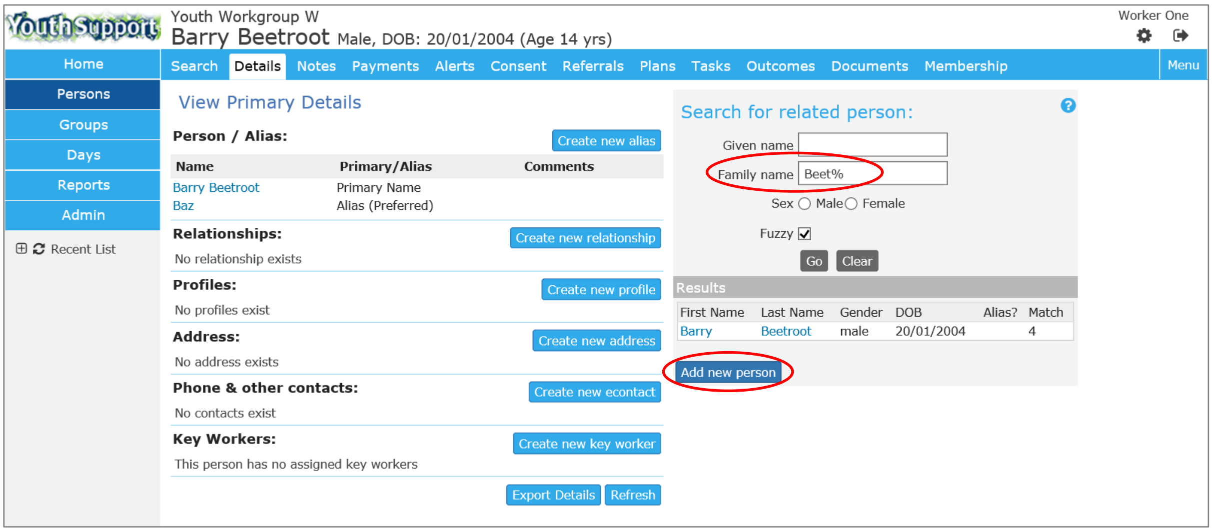


3. Details for the Alias can be updated at any time. To access the Edit Alias Details record, simply click on the blue Alias name.

3.4 Record Relationships

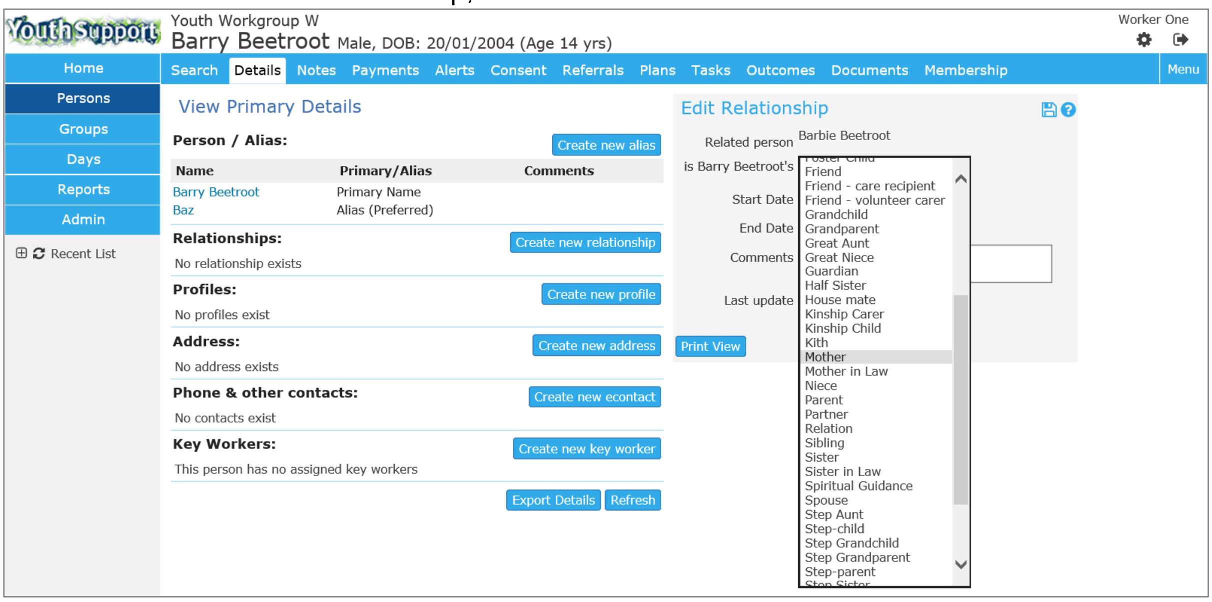
1. From the **Person** Page, **Details** tab, select **Create new relationship**

2. Search for the related person – using % is recommended.
If a record for the person is not found, select **Add new person**



3. Complete the record as outlined in section Add a Person . Click **Save**.

4. The Edit Relationship form will display.
Select the correct relationship, click **Save**.



Note: The start date for the relationship may be the client's Date of Birth or it could be the start date of care (e.g. foster care). This field is not mandatory.

A Person record has now been created for that Person. They have been 'connected' with that Person via the displayed relationship. You can access that Person record simply by clicking on their name.

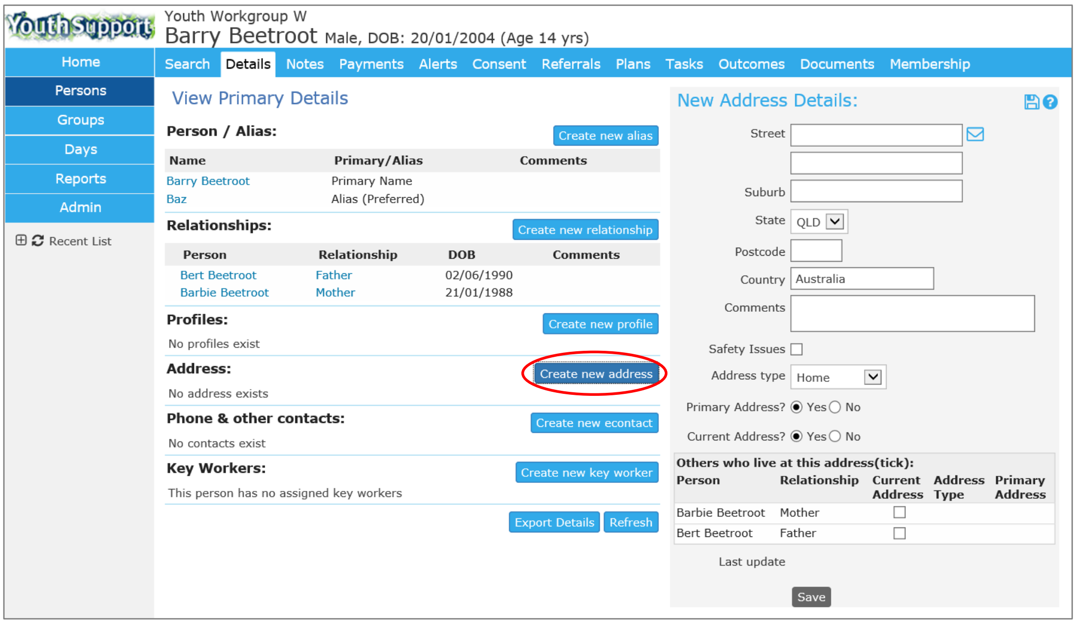
5. To modify the Relationship, click on the **Relationship** value- the Edit screen will display on the right hand side. Update the details and select **Save**.

6. To cease a relationship, enter an **End Date.**
Users with Coordinator access are able to **Delete** a Relationship record if required.

3.5 Record Address

Multiple current addresses (such as home, postal or respite) can be recorded for a Person. However, at any one time, a person can only have one primary address. A single address can be associated with multiple related persons.

1. Select **Create new address** and the New Address Details form will appear to the right of screen.



2. Enter the address details

3. Select the envelope icon if you wish to make the address ‘Care Of’ somebody other than the client

4. Select the Address type

5. Update the Primary and Current address status (Yes/No)

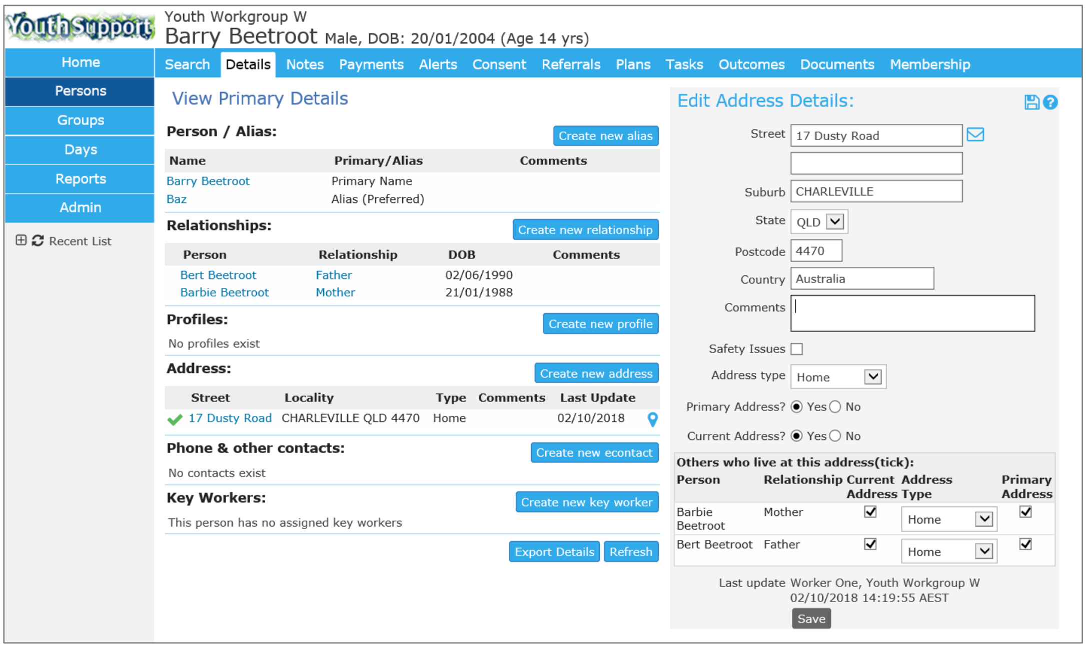
6. Record other people with relationships to the client that are living at the same address by ticking the **checkbox** at the bottom of the New Address Details form. Note this will be identified by persons related to the client. Ticking these boxes automatically updates the address of the person/s whom you ticked.

7. Select **Save**

8. To edit the address, select the blue text of the address which will reopen the Edit Address Details page. To view address in google maps, select the icon

Additional Notes:

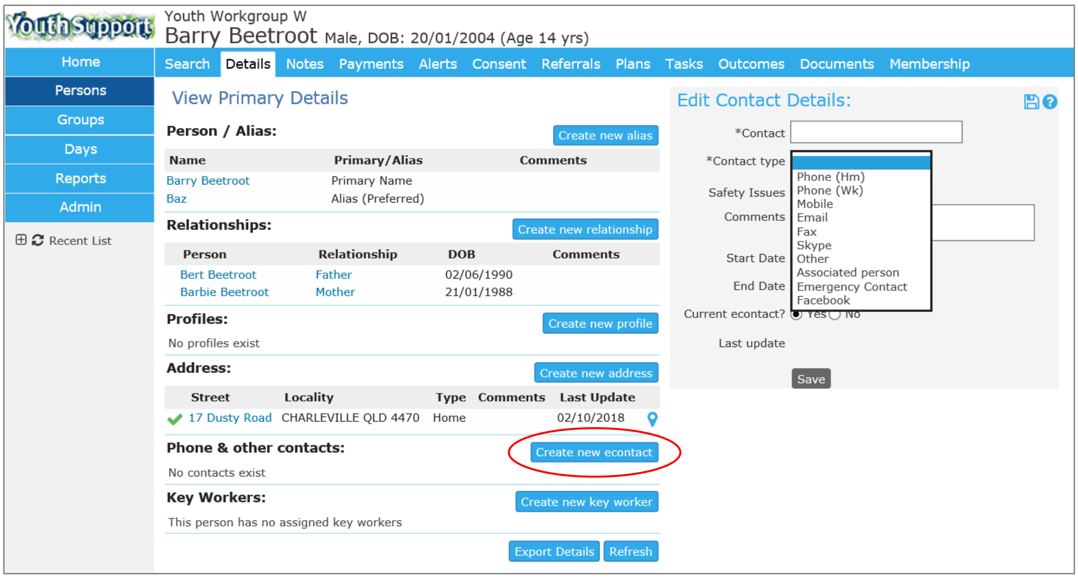
- When you start typing the **Suburb**, a list of possible options will appear.
- **State** and **Postcode** will be populated automatically, assuming the **Suburb** is recognised.
- When a **Primary Address** has been entered and you click on **Create new address**, the application will prompt you to identify whether you are entering a new **Primary Address**
- Only addresses marked as **current** are displayed
- To close an address tick ‘No’ in the Current Address field
- To view non-current addresses, select **View Prior**
- The Primary Address is identified by a green tick in the list of addresses as per the following screen shot.



3.6 Record Phone & other contacts (email, facebook etc)

A Person can have multiple electronic contact records such as phone, email, fax, facebook and mobile. Other contacts such as an emergency contact or workers at external agencies can also be associated with the person record.

1. Click **Create New eContact** and the **Edit Contact Details** form will appear to the right of screen.



2. Enter the **Contact** details. This may be the telephone number, email address, facebook address etc.

3. Select a **Contact type** by clicking the drop down menu.

4. Add **Comments** as required.

5. Enter the **Start Date** by using the calendar icon.

6. If this is the current contact for the client set **Current econtact?** To Yes

7. Select **Save**.

8. To modify the Contact details click on the **Contact** and the edit screen will display on the right hand side. Update the details and select Save.

9. To cease a contact, enter an **End Date**.

Additional Notes:

» A user with YSCIS Coordinator access level is able to delete a Contact record.

3.7 Assign Key Workers

A Person can have one or more Key Workers recorded.

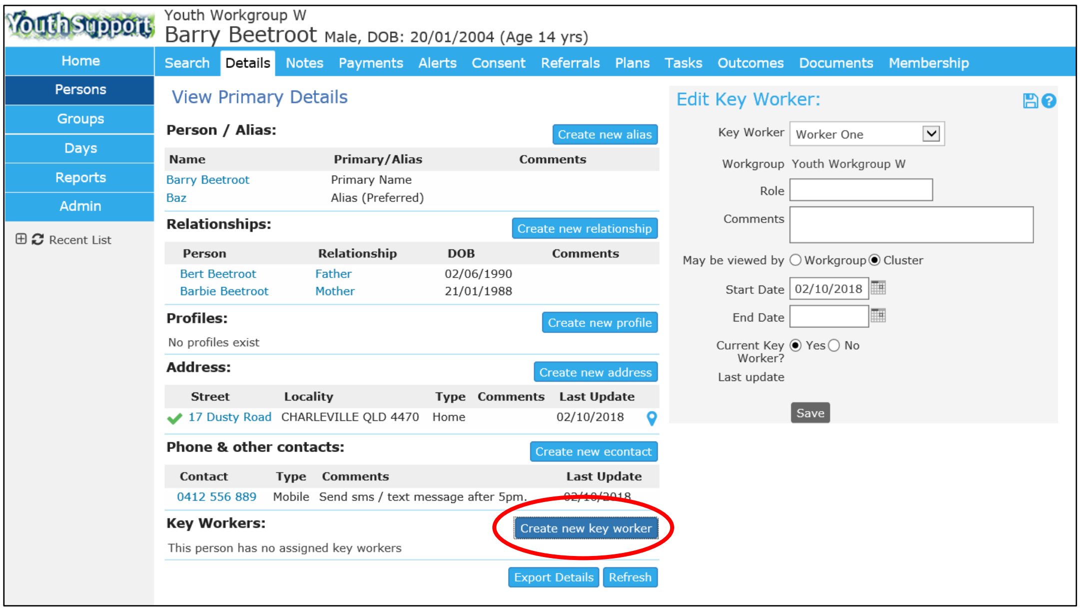
Key workers can be members of your service involved with this client or other people, external to your service, who assist the client. Where a member of your service is recorded as a Key Worker, this Person will display on their **My List** tab on the **Home** page.

Where no particular Person within your service is assigned to a client, Persons can also be identified as being **Team Managed**. This Person will display on My List for all workers within your service.

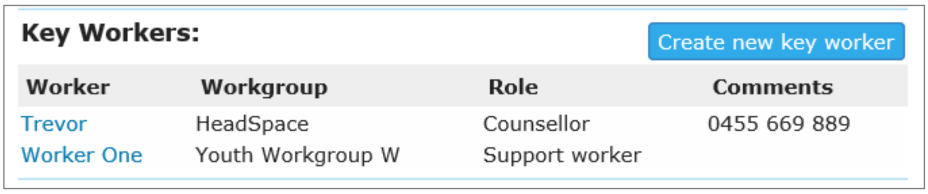
When you record a new Key Worker, you have the option to record useful comments about the role of the key worker and his or her responsibilities.

1. Select **Create New Key Worker** and the **Edit Key Worker** form will appear to the right of screen.

2. Select the **Key Worker** from the drop-down list.



3. To create a key worker record for an external person, select '**Other, please specify**:' from the **Key Worker** list. You will then be able to enter their name.


Key Workers: Create new key worker

Worker	Workgroup	Role	Comments
Trevor	HeadSpace	Counsellor	0455 669 889
Worker One	Youth Workgroup W	Support worker	

4. Select **Team Managed** if the person is managed by the whole workgroup and not assigned to any individual worker

5. Add **Role** and **Comments** as required.

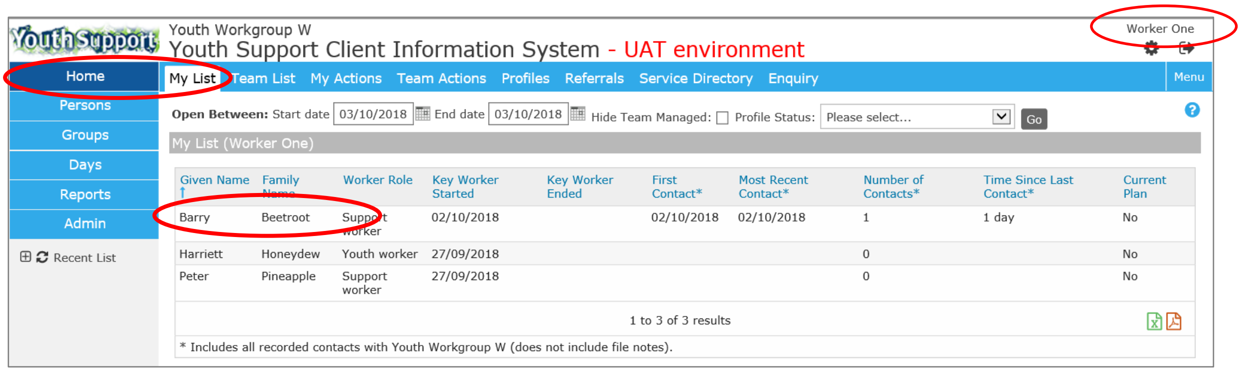
6. **May be viewed by** – there is no difference between these options for workgroups within YSCIS. Only users set-up within your workgroup can view your records.

7. Enter the **Start Date** by using the calendar icon.

8. If this is the current Key Worker for the client set **Current Key Worker?** to Yes

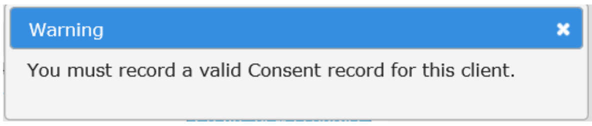
9. Select **Save**. To modify the Key Worker click on the **Key Worker** and the edit screen will display on the right hand side. Update the details and select **Save**. To cease a Key Worker enter an **End Date**.

When you are recorded as a Key Worker on a Person record, it will display on the **My List** and **Team List** tabs on the **Home** page:



4 Add Consent

Consent is mandatory. As soon as you add a Person record, a warning message will pop up ‘You must record a valid Consent record for this client’. This message will continue to appear until a consent record is added. Each person recorded in YSCIS must have a consent record, for example, a parent of a client.



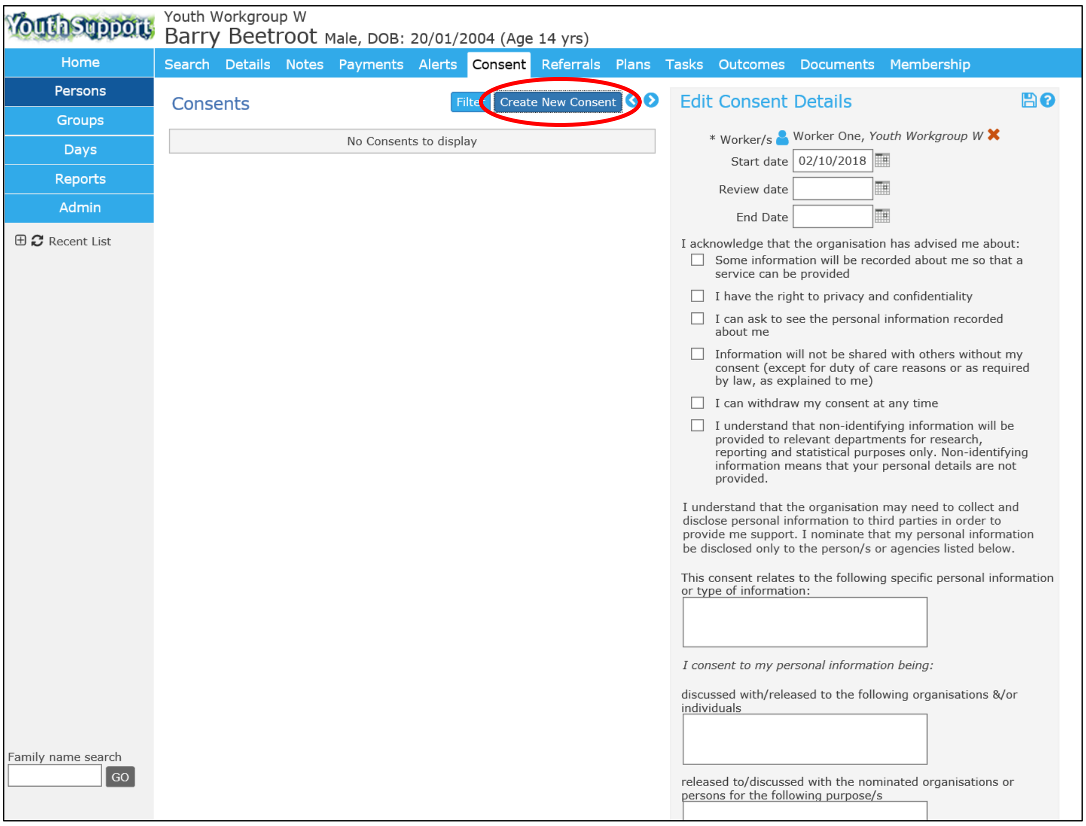
It is possible to have multiple consents current in a client’s file. Organisations may ask clients for additional consent, for example, travelling in a work vehicle. If organisations have their own consent form, it can be uploaded and added to the record on this page.

Consent should be reviewed regularly with clients and it is compulsory to enter a review date.

Verbal consent can be recorded in the **Notes** free text box at the end of the form. Once a Consent Form has been saved, a new Consent Form can be generated with the existing pre-populated information, except for the signature.

1. From the **Person** page, select the **Consent** tab

2. Select **Create New Consent**



3. Enter **Start** date and **Review date** of consent.

Note: **Review date** is mandatory and it is recommended that consent is reviewed every 3 months. The review will appear on the **My Actions** tab (on the **Home** page) for that worker.

4. Click the checkboxes as appropriate and record consent details in the text boxes provided. Alternatively, organisations may choose to upload their own consent form, if this is the case move to step 5. *Some examples of text to put in the consent text boxes are listed below.*

Example text for consent

This consent relates to the following specific personal information or type of information:

- My health, including mental health and my accommodation situation and needs
- Anything that is necessary to assist me access accommodation and re-enrol in education
- My involvement in the legal system, including court dates
- Information that assists ABC Service to ensure that all agencies involved in my case plan are kept up to date about my day to day situation

I consent to the stated information being discussed with/released to the following individuals:

- All information stated with CYMHS, my mother and just my accommodation needs with accommodation providers
- Potential education and accommodation providers
- Youth justice, the Youth Advocacy Centre and my mother
- All agencies that are providing me support/services including Youth Justice, Child Safety and ABC Service

Notes:

- This information will be reviewed when my case plan is updated or changes
- I do not consent to any information being shared with anyone in my family other than my parents
- Consent was provided verbally over the phone

5. Select **Save**

6. Use the triangles  to increase or decrease the size of the **Notes** field

The Consent form can now be printed for your client to sign by selecting **Print View,** then printing. **Note**: This feature requires **ALL** boxes/field to be completed. If it is relevant for the boxes/fields to only be partially completed, you will need to complete a manual form and attach it. An example blank consent form can be found on the Admin page under the Documents tab.

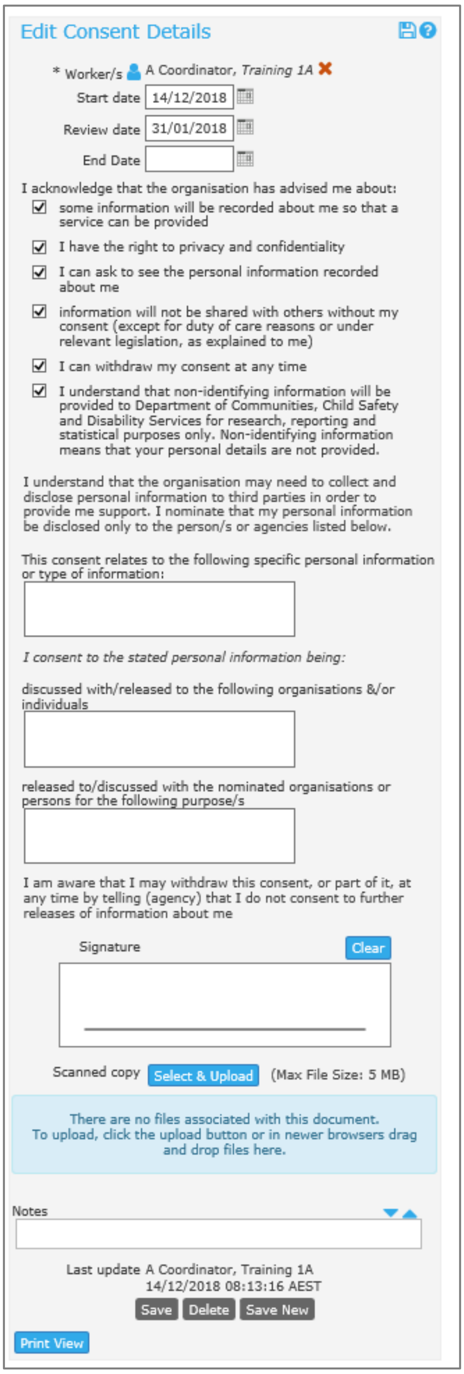
7. The scanned copy of the consent form can then be scanned and uploaded by selecting the Select & Upload button. If working from a tablet or mobile device, the client can sign consent on-screen using a stylus pen or their finger

8. Once signed and/ or documents uploaded select **Save**.

9. To **End Date** consent select consent from the list, this will open the edit consent screen, enter an End Date and select save.

10. To **modify an existing consent** (to update) select consent from the list, this will open the edit consent screen and select the **Save New** button. This will copy the existing consent (excluding signature and documents attached) and create a new consent record.

Example for illustrative purposes only:



Edit Consent Details

* Worker/s A Coordinator, *Training 1A*

Start date 14/12/2018

Review date 31/01/2018

End Date

I acknowledge that the organisation has advised me about:

- ☑ some information will be recorded about me so that a service can be provided
- ☑ I have the right to privacy and confidentiality
- ☑ I can ask to see the personal information recorded about me
- ☑ information will not be shared with others without my consent (except for duty of care reasons or under relevant legislation, as explained to me)
- ☑ I can withdraw my consent at any time
- ☑ I understand that non-identifying information will be provided to Department of Communities, Child Safety and Disability Services for research, reporting and statistical purposes only. Non-identifying information means that your personal details are not provided.

I understand that the organisation may need to collect and disclose personal information to third parties in order to provide me support. I nominate that my personal information be disclosed only to the person/s or agencies listed below.

This consent relates to the following specific personal information or type of information:

I consent to the stated personal information being:

discussed with/released to the following organisations &/or individuals

released to/discussed with the nominated organisations or persons for the following purpose/s

I am aware that I may withdraw this consent, or part of it, at any time by telling (agency) that I do not consent to further releases of information about me

Signature Clear

Scanned copy Select & Upload (Max File Size: 5 MB)

There are no files associated with this document.
To upload, click the upload button or in newer browsers drag and drop files here.

Notes

Last update A Coordinator, Training 1A
14/12/2018 08:13:16 AEST

Save Delete Save New

Print View

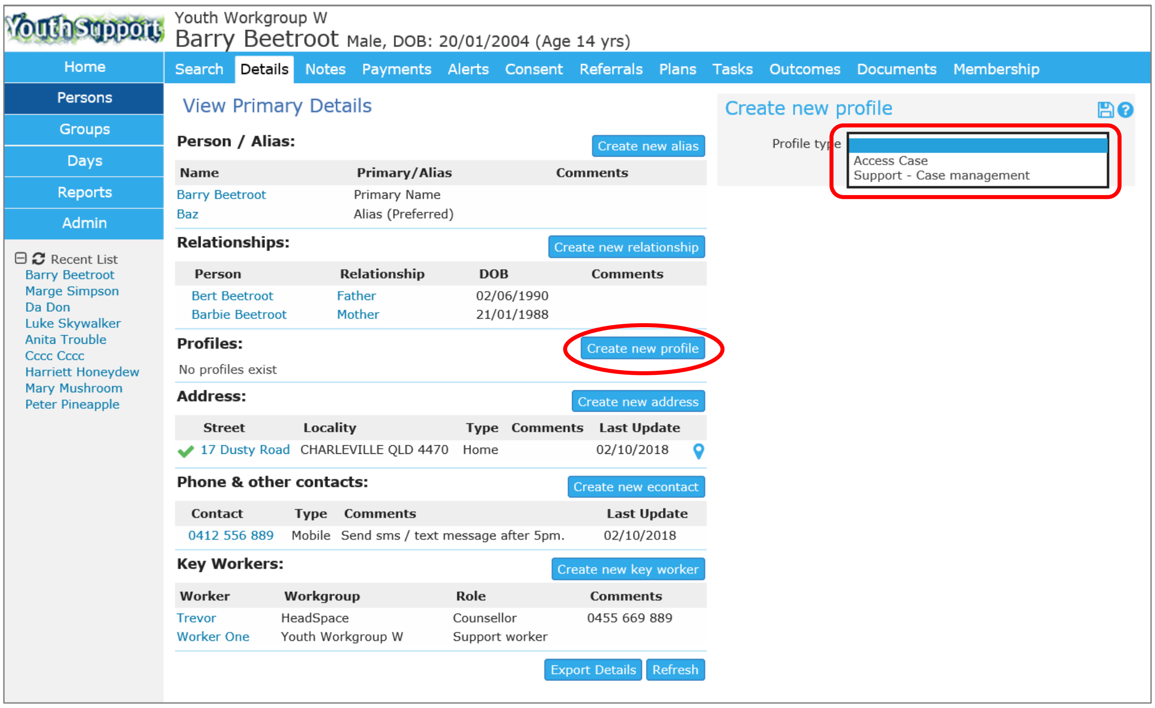
5 Case Profiles

5.1 Create a Case Profile

In YSCIS, Cases are recorded as **Profiles** - on the **Persons** page, Details tab. Profiles should be created to match the service provided: *Access* or *Support – Case management*.

All notes, payments, plans and Assessments for a client are linked to a case/profile. A client should only have one active case at a time. Cases are closed at the time your work with your client is complete.

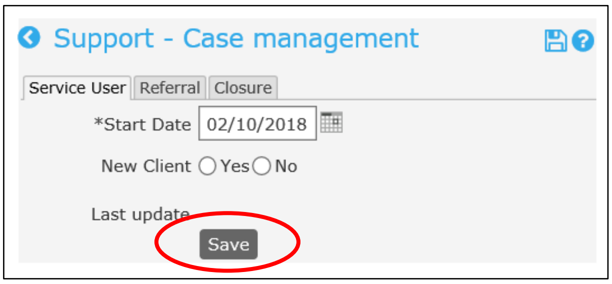
1. From the **Person** page, **Details** tab select **Create new profile**



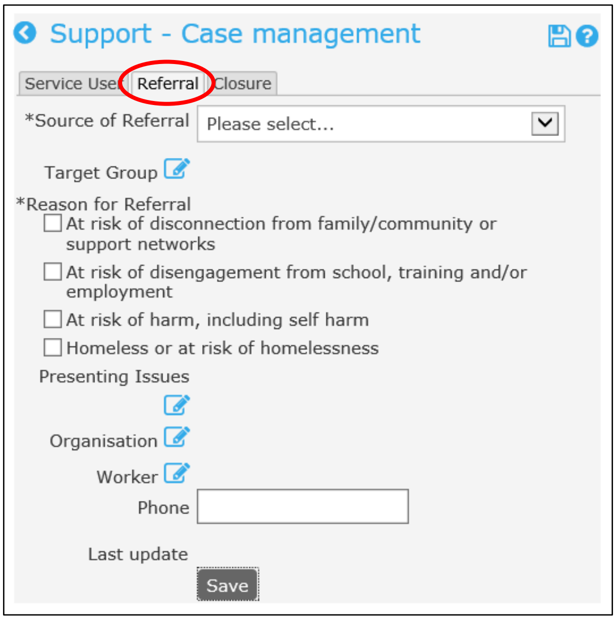
2. Select the **Profile type** from the list and click **Create**

The Case form appears. It comprises of 3 sub-tabs: **Service User**, **Referral** and **Closure**.

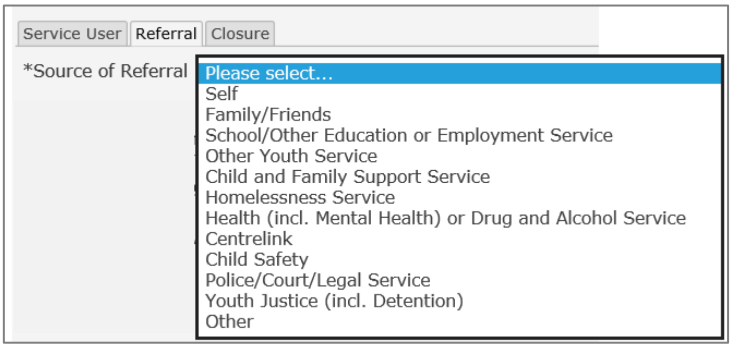
3. On the **Service User** sub-tab, enter the **Start Date** of the **Case.** Click **Save.**



4. Select the **Referral** sub-tab within the Case :



5. Complete the ***Source of Referral*** from the drop-down list :

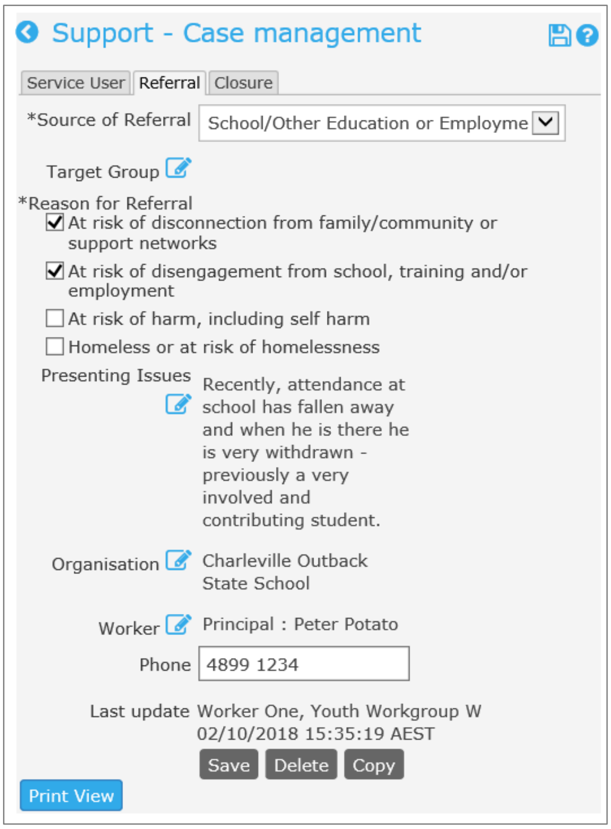


6. Select the ***Reason for Referral*** - multiple values can be selected

7. Record any **Presenting Issues**, the **Organisation** referred from and the **Worker** from that Organisation by selecting the corresponding icons

8. Click **Save.**

Refer over page for example….



9. If a Case has been incorrectly created, you may delete it. **Be very sure this is required.**

<u>IMPORTANT NOTE: Transition period</u>

YSCIS was updated to reflect the new Youth Support model (effective from 1st July 2018) in late December 2018. During this period, services were able to select *Support* or *Integrated Response* cases for the new case category of *Support – case management*.

The ***DCSYW Performance Report*** and the ***DCSYW Performance List*** for periods commencing on and after 1st July, 2018, will include *Support* and / or *Integrated Response* cases, as relevant, in measures defined under the new Youth Support model as *Support – Case management*.

6 Case Notes

Service delivery and your case management activities are recorded using **Notes**. These Notes record the time spent by the worker. These records reflect in the *DCSYW Performance Report* for your service.

Case notes are recorded in the **Persons** Page, from the **Notes** Tab.

The definitions for each category are:

» **Contact**: direct time spent with the young person, including travel with young person in the vehicle

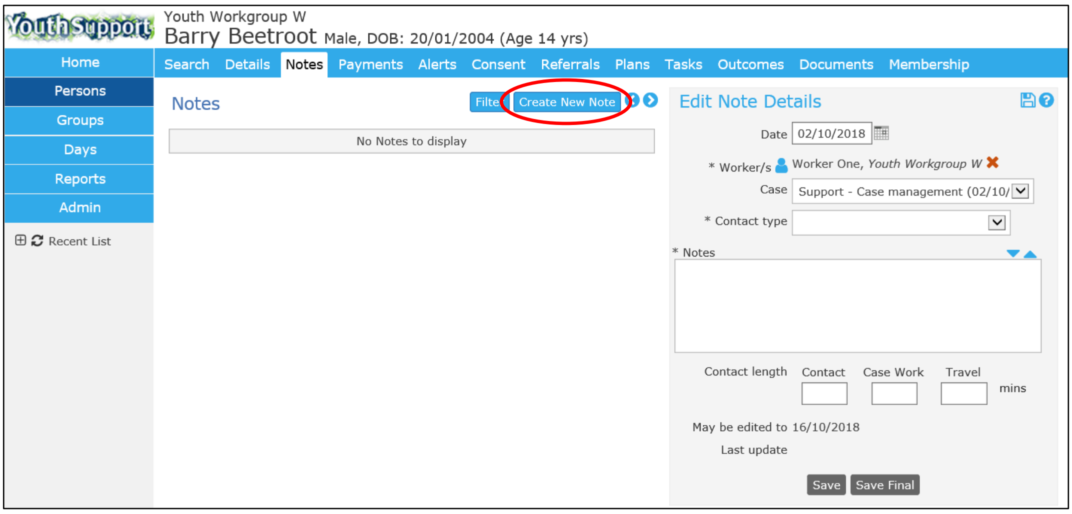
» **Case Work**: time spent on behalf of the young person (e.g. case coordination)

» **Travel:** other travel undertaken including travel to meetings for a client without them in the car.

6.1 Create a Case Note

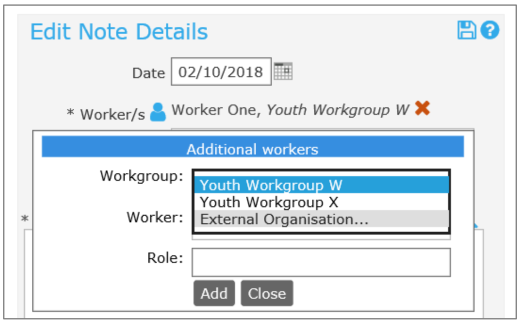
1. From the **Person** Page select the **Notes** tab

2. Select **Create New Note**



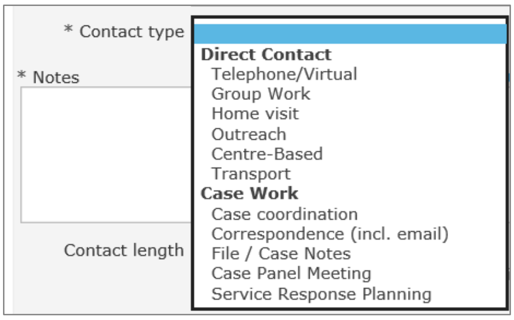
3. Enter **Date** of note (can be backdated)

4. Add **Worker/s**. The worker will default to the user entering the data. Additional workers can be added by selecting the icon. External workers can be added to the note to record their attendance.



5. **Case** will default to the active case for the Person.

6. Select the **Contact type** from the drop-down list.



If you have spent time with a client that includes a number of contact types e.g. *Case coordination* and *Home visit*, select the contact type where you spent the most time. If you want to record the contact time for each contact type separately, simply record a Note for each activity.

7. Record relevant comments relating to the activity in Notes box. This is informed by the case management protocols applied by your service.

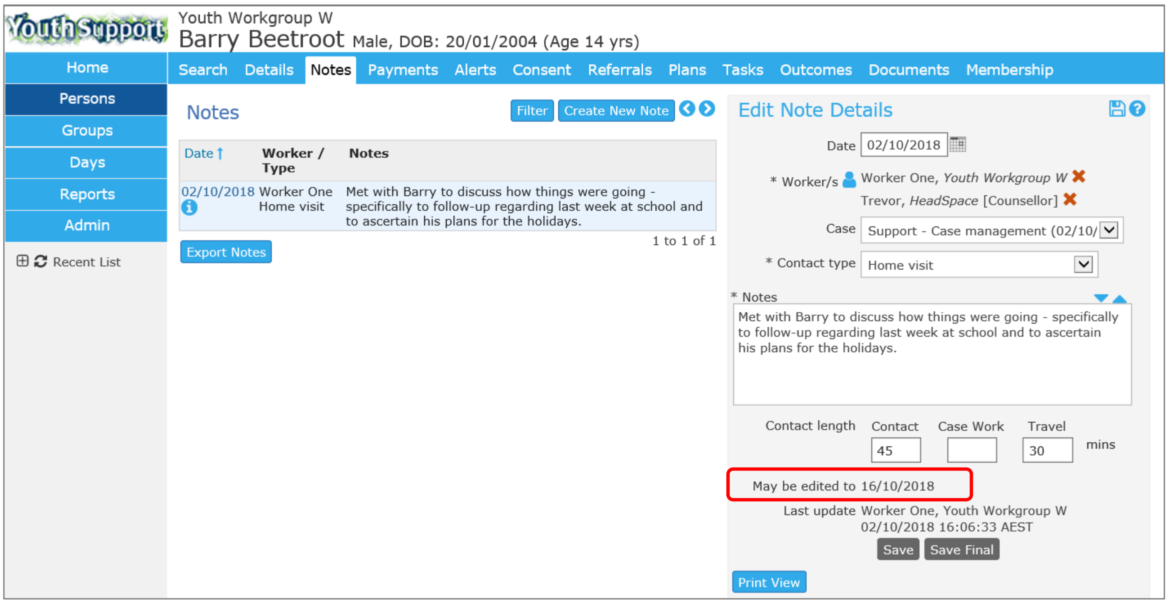
8. Enter the time spent with or on behalf of the client in the **Contact length** fields – record time in **minutes**.

Definition of the time breakdown categories are:

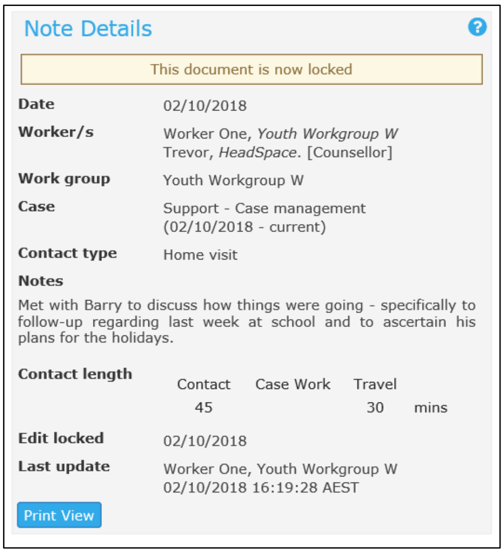
- » ***Contact***: direct time spent with the young person, including travel with young person in the vehicle
- » ***Case Work***: time spent on behalf of the young person (e.g. case coordination)
- » ***Travel***: other travel undertaken including travel to meetings with a client without them in the car

All time is included in your Performance Report (Travel time has been included from 1st April 2018).

9. Select **Save** to save a draft of the Note. (All notes will become locked/un-editable after 2 weeks of saving).



10. Select **Save Final** to lock the Note.



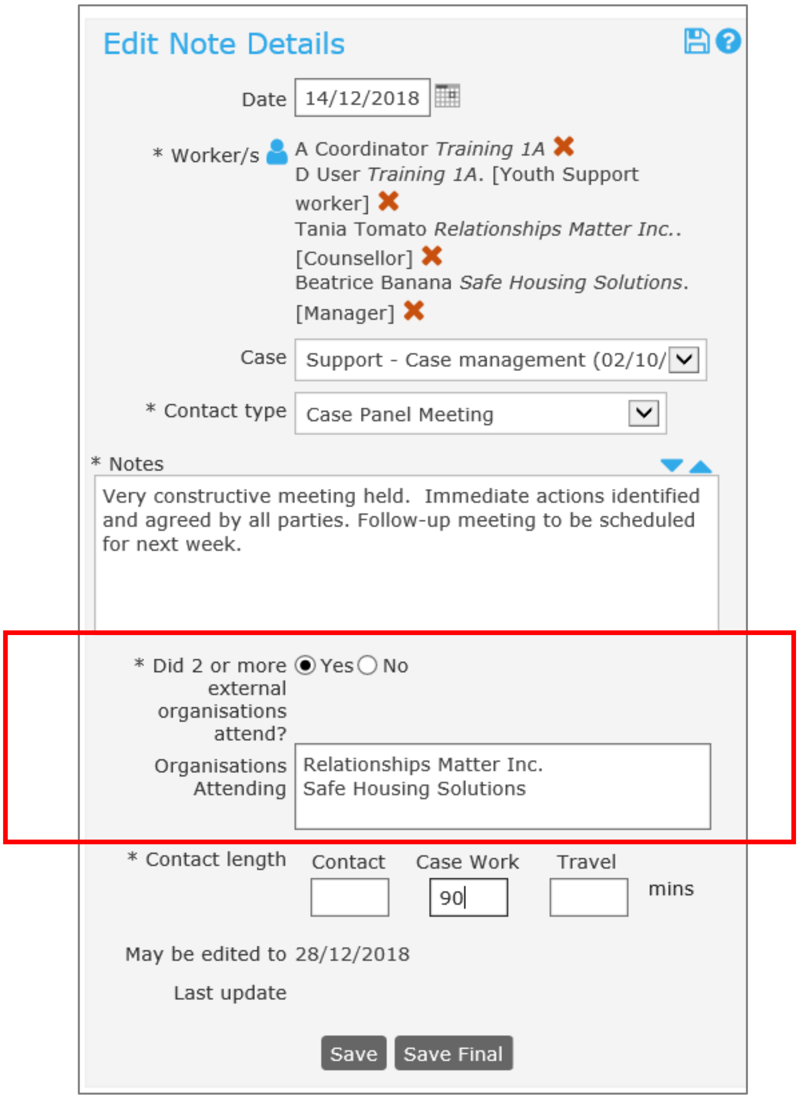
Additional Notes:

- A user with YSCIS *Coordinator* access level is able to delete a Note record that is not locked.
- After a record is locked, it is no longer able to be edited.
- To unlock a Note (for amendments), contact the Infoxchange HelpDesk.

6.2 Create a Case Note for a Case Panel meeting

When a Case Note is created for a client that has a Support – Case management case (previously, an Integrated Response case), additional fields are displayed when the *Contact type* is **Case Panel Meeting**.

The two additional fields are **Did 2 or more external organisations attend** and **Organisations Attending**. This information is included in *DCSYW Performance Report* for your service (for Measure IS131).



7 Assessments

7.1 Record Assessments

Youth Wellbeing Assessments are recorded in the **Persons** page, **Outcomes** tab.

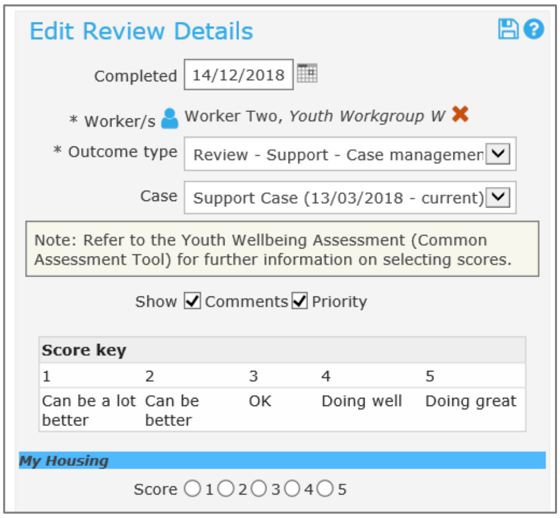
Assessment data is collated for performance reporting for your service.

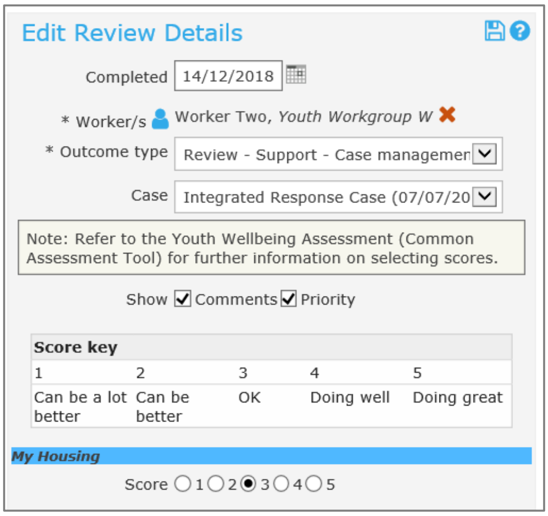
Details and instructions on completing the Youth Wellbeing Common Assessment Tool can be found on the following website https://www.csyw.qld.gov.au/youth/youth-support-services

For **Access** cases, workers can record an *Initial contact assessment*. The *Initial contact assessment* is a light touch assessment with only the first six questions included from the Youth Wellbeing Assessment. An *Initial contact assessment* should be undertaken prior to referring the client to another agency to ensure that the full range of issues faced by the client are recorded and passed on to the referral agency. This assessment is designed to assist you in determining the full needs of the young person and not for tracking their progress or for capturing data for performance measures.

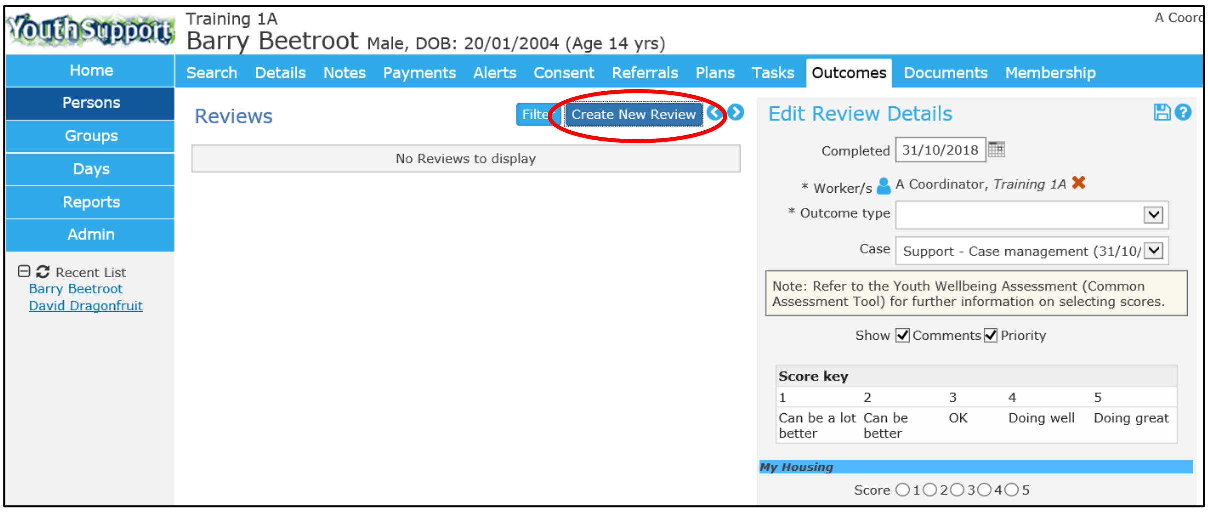
For **Support – Case management** cases, workers can record *First*, *Review* and *Final* Assessments. Multiple *Review* assessments can be completed during your period of working with the young person (refer to Sections 3 & 4 of the Youth Support Practice Guide for best practice regarding assessments).

NOTE: To support the transition to the new Youth Support Program model, YSCIS allows for *Review* and *Final* Assessments to be recorded for open **Support** and **Integrated Response** cases. These will be recognised in your *DCSYW Performance Report*.



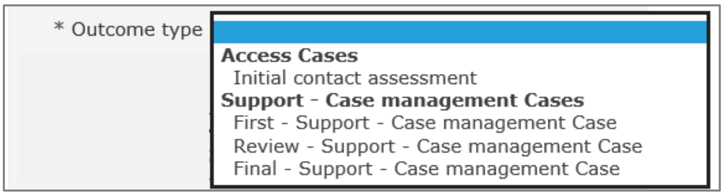


1. From the **Persons** page, select the **Outcomes** tab, click **Create New Review**



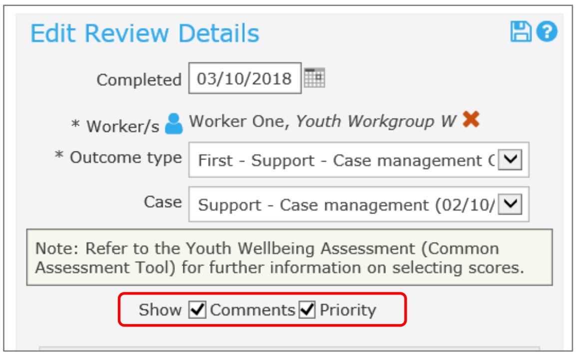
2. Enter the Date the Assessment was **Completed**.

3. Select the **Outcome Type**.
For Access Cases, select *Initial contact assessment*.
For Support – Case management (or open Support or Integrated Response cases during the transition period), select relevant Assessment from the list.



4. **Case** will default to current case profile.

5. **Show Comments** and **Priority** will be pre-set to checked. If you do not wish to see the comments or priority, uncheck the boxes.



6. For each domain, record the assessed position of the young person with regard to the **Score key**.

7. Against each domain, the user can select if the domain is a priority for the client and also add any additional comments.

8. Select **Save** to save a draft of the assessment. To modify this assessment at a later stage, select the assessment from the list screen, update as required, then select **Save.**

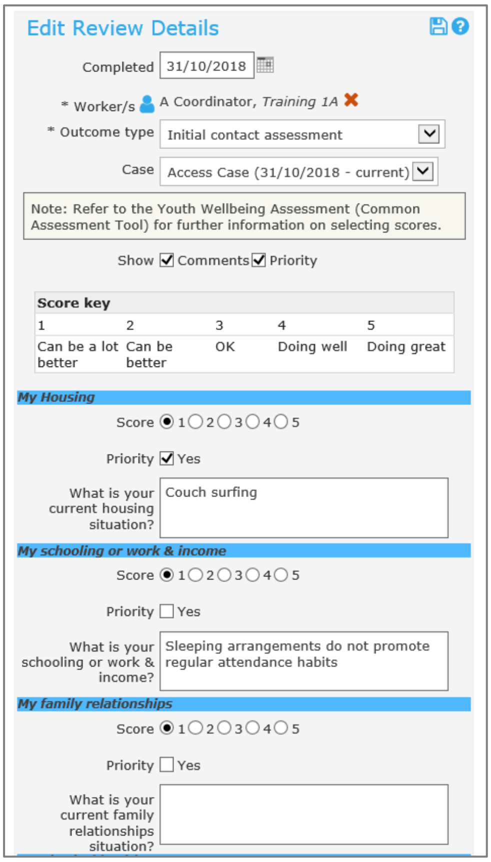
9. Select **Save Final** to lock the assessment (cannot be modified).

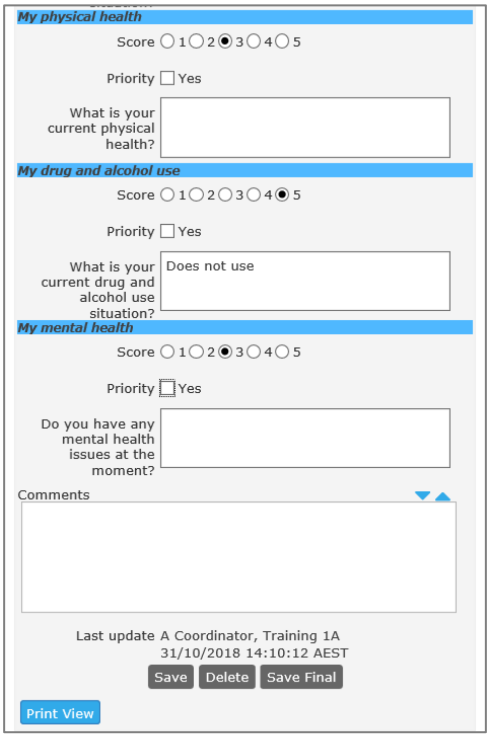
10. Assessment can be printed by selecting **Print View.**

Additional Notes:

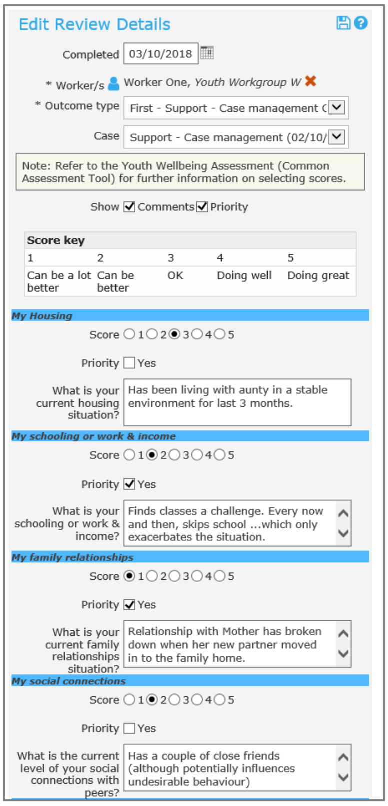
- A user with YSCIS Coordinator access level is able to delete an assessment record that is not locked.
- Deleting assessment records from a previous reporting period may impact on Performance Report for your services. It is recommended ***not*** to delete data that predates the current quarter.

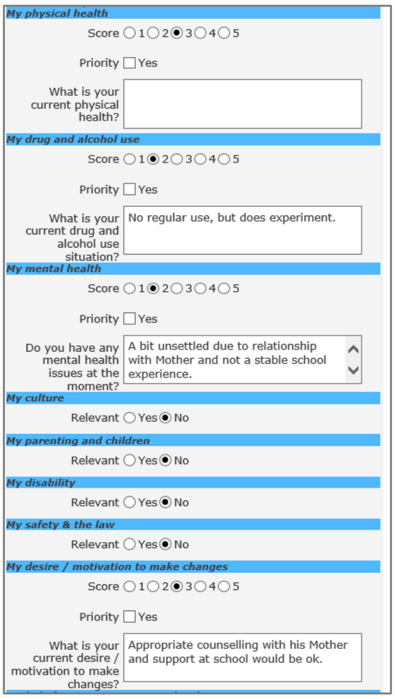
Example of *Initial contact assessment* for Access cases

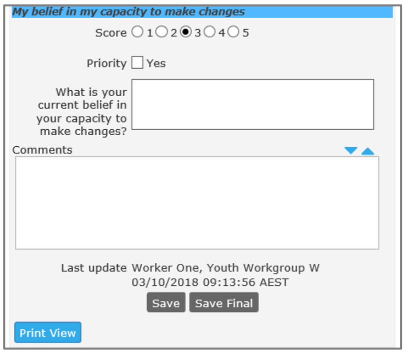




Example of Assessment for Support – Case management cases







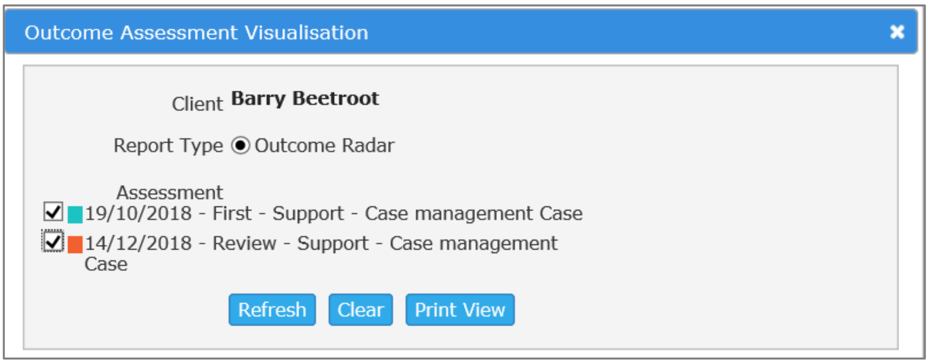
7.2 Compare Client Assessments

For assessments recorded against **Support – Case management** cases (including ***Support*** and ***Integrated Response*** cases during transition), users can compare a **First**, a **Review** and a **Final** assessment using the chart function.

The Chart can be opened as PDF and printed.

1. From the **Persons** page, **Outcomes** tab, select **Chart**

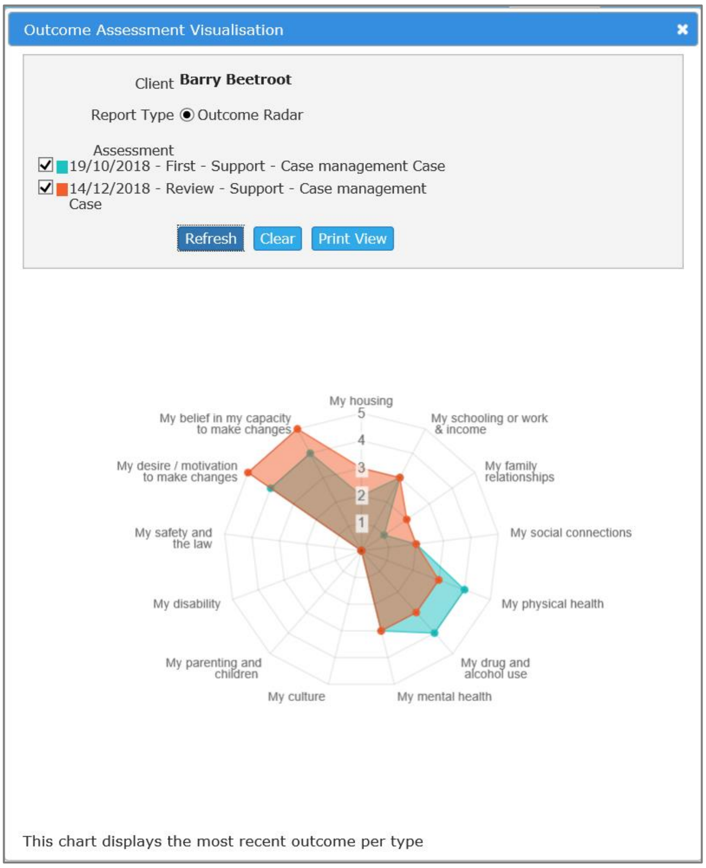
2. Select the Assessments you wish to compare (tick the checkbox) and click **Refresh.**



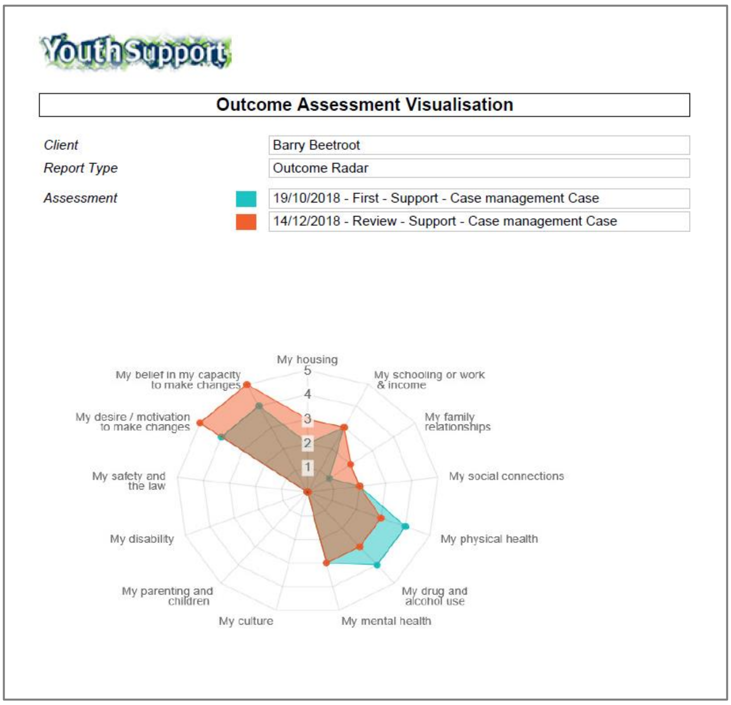
3. The Chart will display, showing the comparison between the selected Assessments – refer screenshot on the following page.

If you wish to change the assessments to display, simply click 

and select the assessments you wish to view.



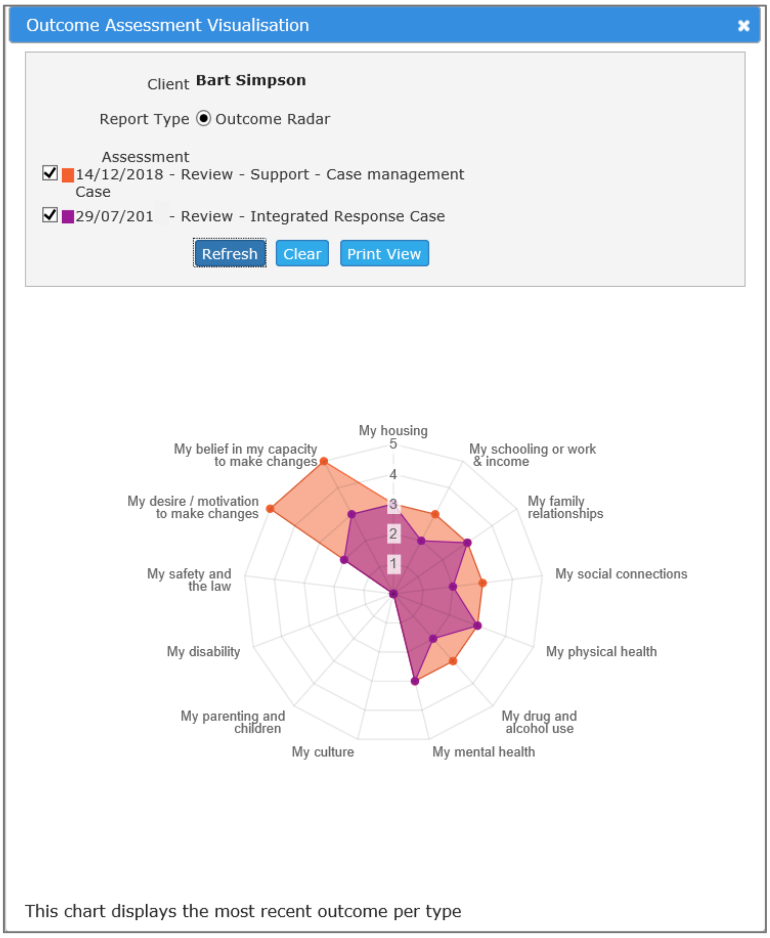
Users can print the chart by selecting **Print View**. It will generate as a pdf document.



Additional Notes:

- The chart will only display the most recent outcome per type, e.g. it will only compare the most recent 'First' assessment against the most recent 'Review' and most recent 'Final' assessment. You cannot compare two 'Review' assessments using this functionality, this can be done by filtering data available from an *Outcomes List* (refer to section Reports).

- To support the transition to the new Youth Support Program model, subsequent review assessments completed for the open Case will be available as below :



8 Case Plans

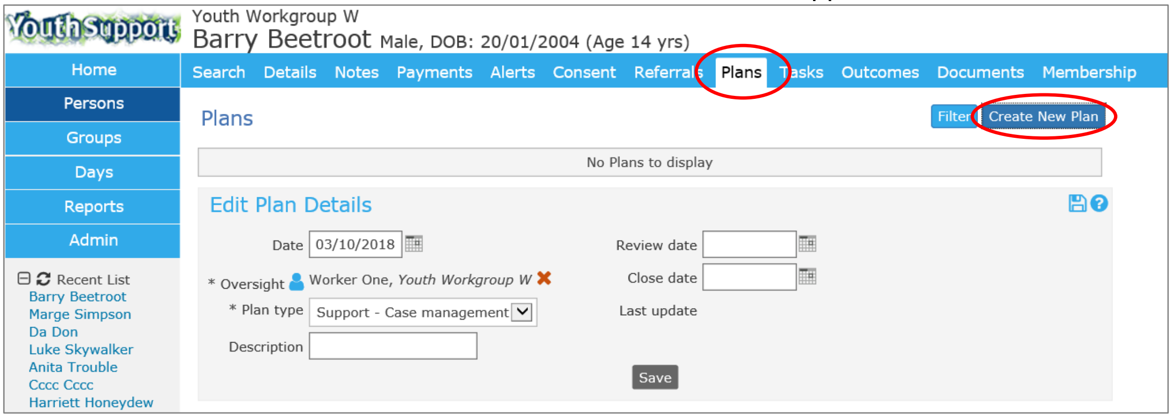
A Plan is a structured intervention comprising specific actions to address the needs of the young person. The **Plans** tab enables you to create and manage a care or case plan for a young person.

A person can have multiple plans, although it is unusual to have more than one current plan. Each plan can have multiple actions enabling the identification and recording of issues, goals, actions and outcomes.

8.1 Create Case Plan

1. From the **Persons** Page, select the **Plans** tab

2. Click **Create New Plan.** **T**he Edit Plan Details form will appear.

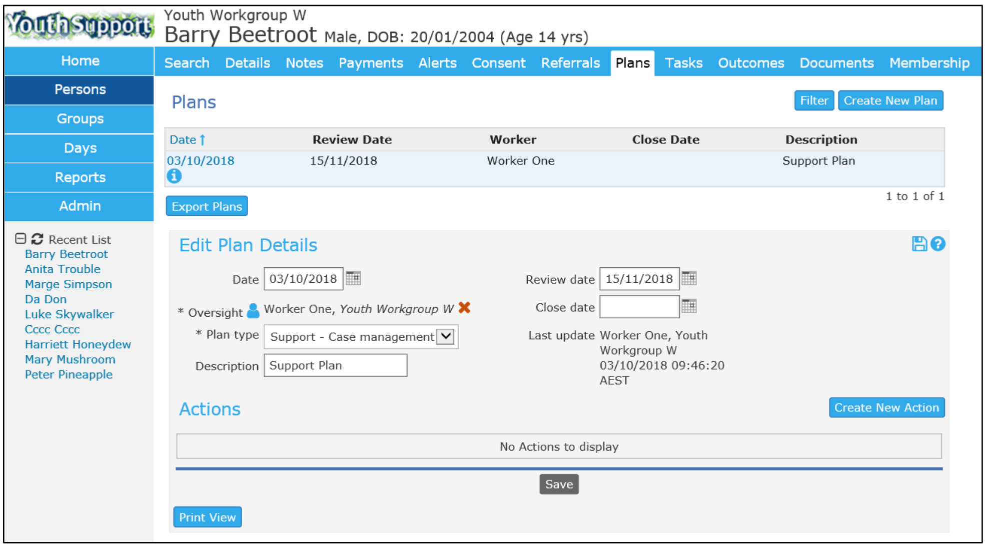


3. Enter the **Date** (defaults to today's date) and **Review date** by using the calendar icon

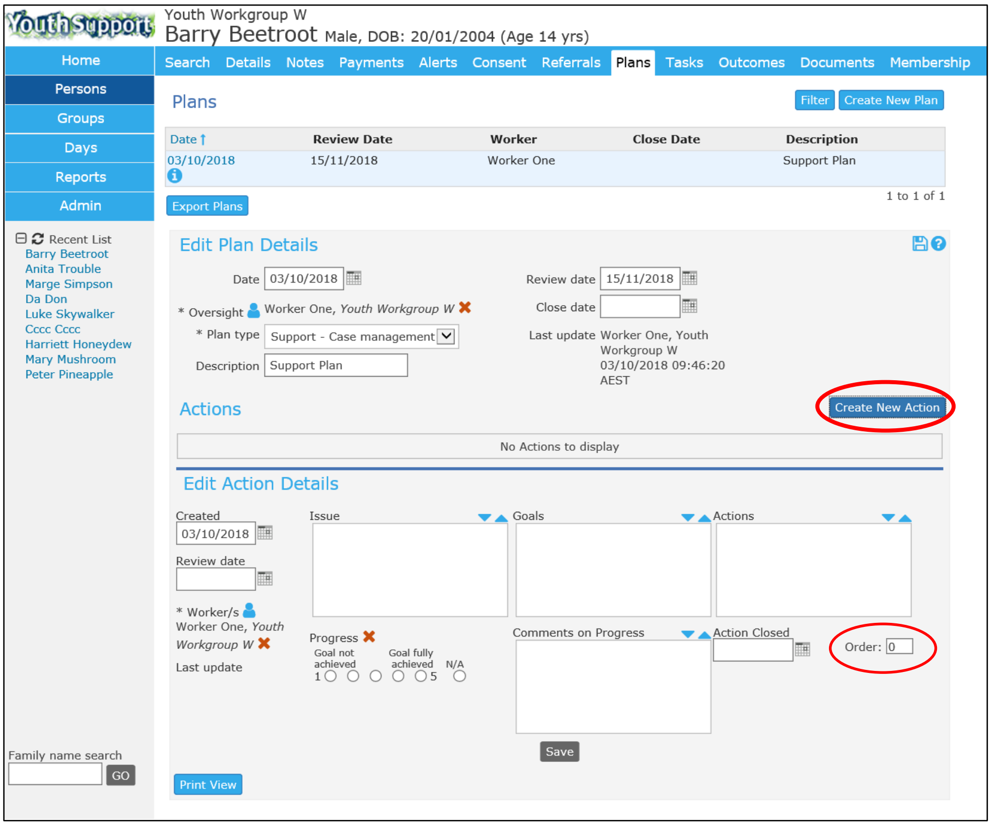
4. **Plan type** will auto-populate to **Support – case management**

5. Enter a **Description** of the plan e.g. Support Plan

6. Click **Save.** The following screen will appear. You can now add Actions to your Plan.



7. Click **Create New Action.** The Edit Action Details form will display.

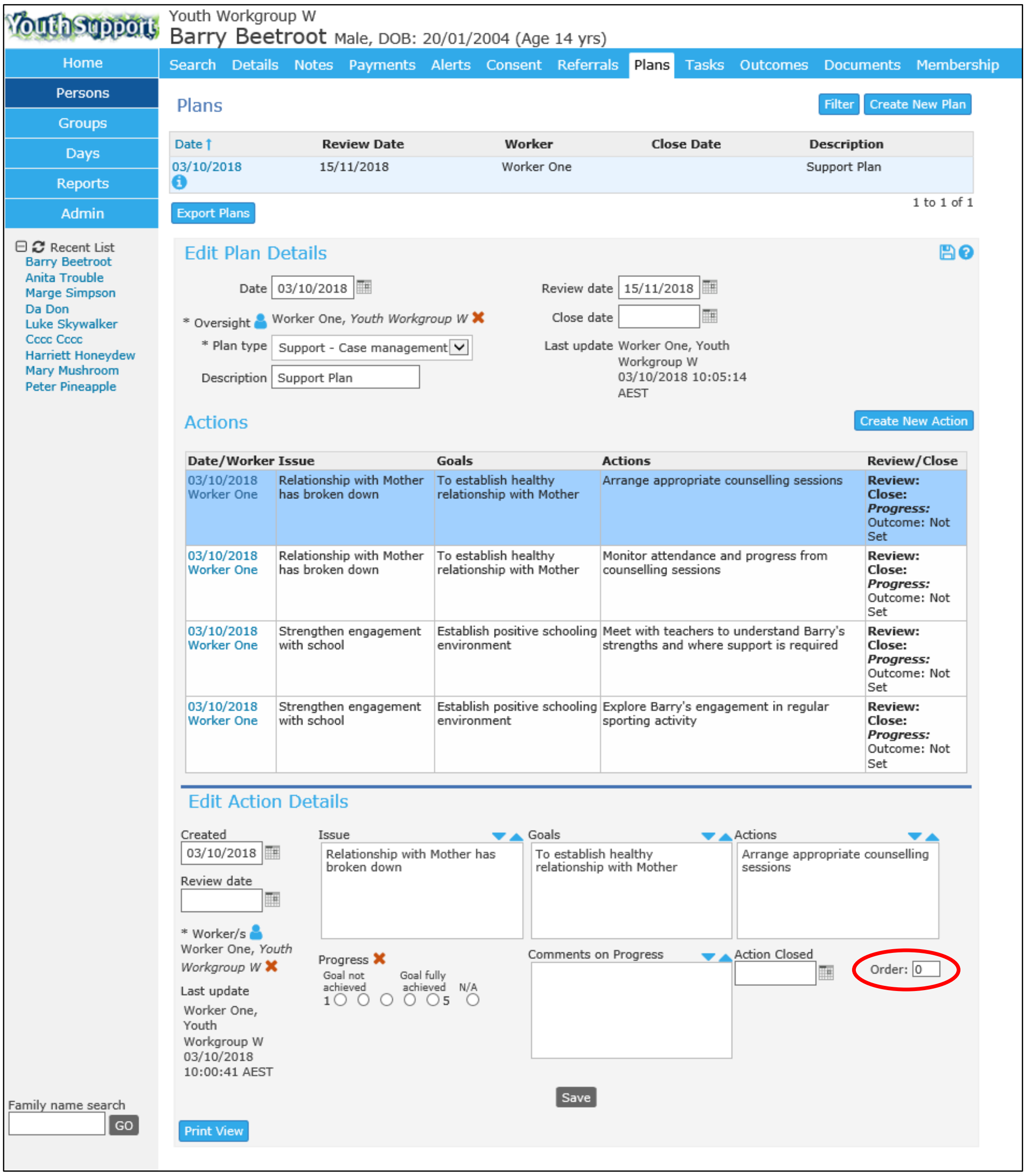


8. For each Action, complete the details for Issue, Goal and Action. Click **Save**.

9. Repeat the above step to complete your plan.

10. The order in which Actions appear in your Plan can be changed by using the Order field in the bottom right-hand corner of each Action.
When each Action is created, it is assigned an order of “0”. Simply assign the required number in each Action to change the order in which they appear in the Plan.

An example plan is shown below:



The Action highlighted in blue is open at the bottom of the screen, for editing and updating.

Additional Notes:

» When using plans for the first time, it is recommended to keep the plan relatively simple, perhaps creating a new action for each different issue.

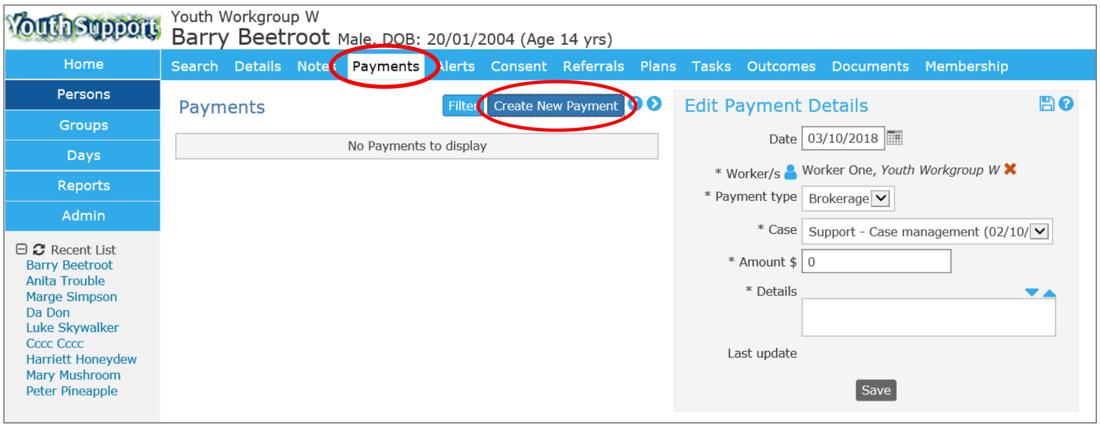
» If you are conducting joint case management, it is possible to record other workers and/or services involved in the oversight of the plan or as the responsible worker for a specific action. Each worker will be provided with a reminder, which appears in their **My Tasks** tab, at the review date.

» A closed **Action** becomes a **Prior Action** that can only be viewed by clicking **View Prior**. This is required if you wish to print all actions associated with a plan.

9 Brokerage

Financial support provided to the young person can be recorded as follows:

1. From the **Persons** Page, **Payments** tab, select **Create New Payment.**
   The Edit Payment details form will display on the right-hand side of the screen.



2. Enter **Date** of payment (defaults to today's date).

3. The **Worker** field will default to the user entering the brokerage payment.

4. Select **Payment type** of *Brokerage.*

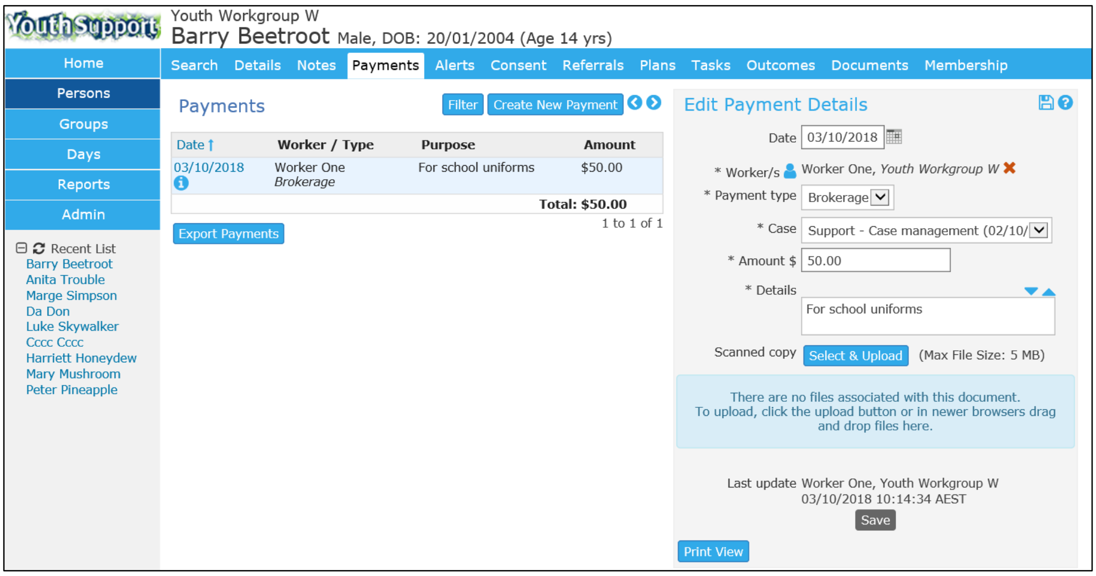
5. **Case** will default to current case.

6. Enter the **Amount.**

7. Enter **Details** of brokerage payment, such as what it was for and invoice number

8. Scanned copies of invoices/supporting documents can be attached by clicking the **Browse** button.

9. Select **Save**. To modify the payment select the payment from the list screen and update as required then select **Save**.



Additional Notes:

- If significant time was spent providing brokerage to the client, this would need to be captured as a **Note**. Refer to section Create a Case Note
- You are able to attach documents to the payment record after you click **Save**.
- A user with YSCIS Coordinator access level is able to delete a Payment record.
- Payments can be printed by selecting **Print View**.

10 Referrals

This section outlines the important functionality for:

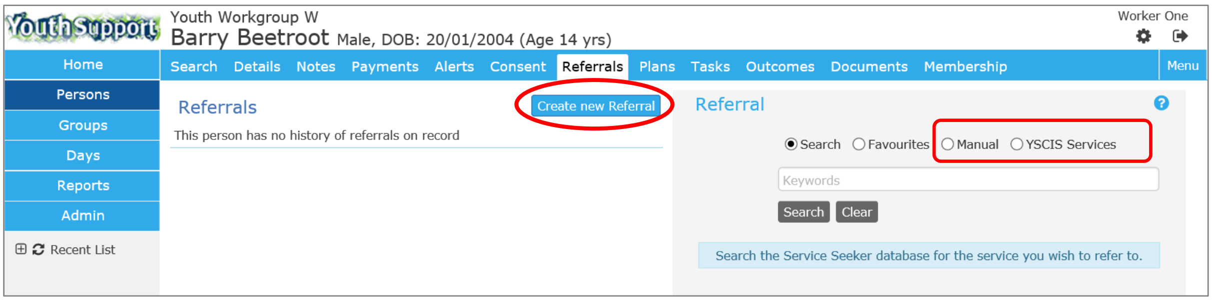
» Making referrals **to** another service provider, and

» Responding to (acknowledging and accepting) referrals **from** another YSCIS service provider.

10.1 Making Referrals to another service provider

All Referrals are made / recorded from the **Referrals** tab on the **Persons** page.

Click the **Create new Referral** button to open the Referral form.



There are **two** recommended options for making a referral to another service. These are:

» **YSCIS Services**: This is a referral to another **Youth Support** Service Provider that has access YSCIS. The referral and case file information is automatically sent within YSCIS and an email is sent to the Service Provider contact email address.
We recommend as best practice that this is followed up with a phone call as a courtesy and to ensure no referral accidentally slips through the gaps.

» **Manual**: This includes referrals to internal or external providers that are not Youth Support YSCIS services. **The referral and associated case file information must be manually sent by the user outside of YSCIS.**

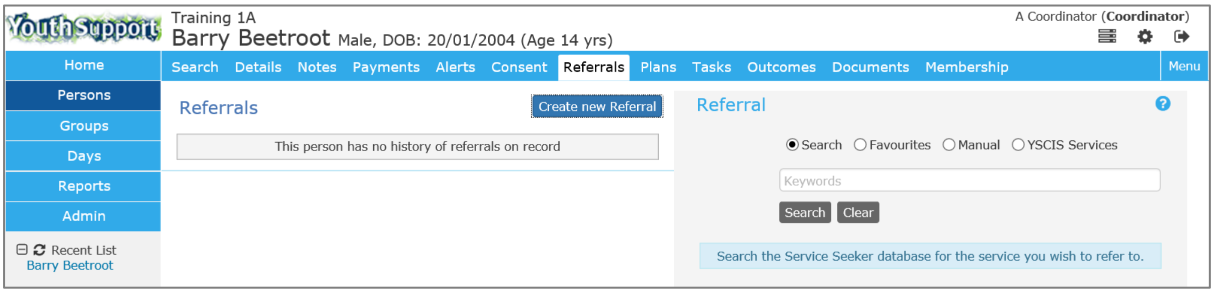
The *Search* and *Favourites* radio buttons access the Service Seeker Database. This is a separate database maintained by Infoxchange – it is independent of YSCIS. This option requires referral information to be manually communicated. For efficiency, the Manual option noted above is recommended.

The detailed steps for each of these options are outlined in the respective sections.

10.1.1 Send a referral to another Youth Support service

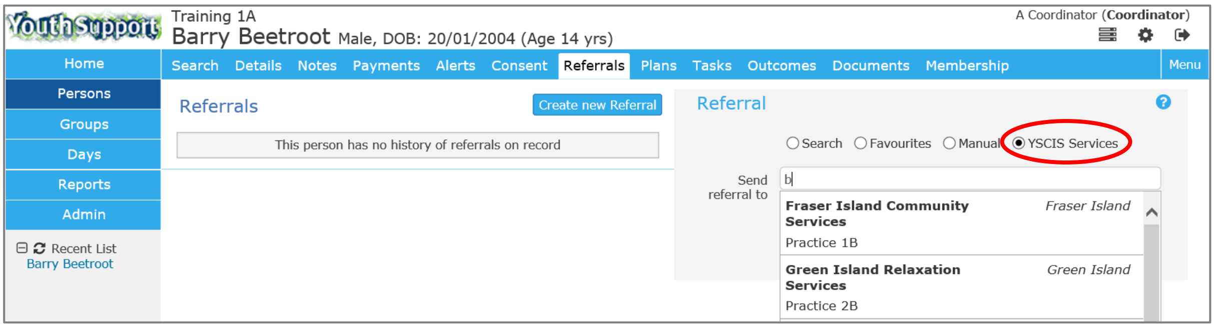
The **YSCIS Services** radio button enables you to make an electronic referral to another Youth Support service. The referral will appear on the receiving service provider's **Referral** tab (on the **Home** page) in their YSCIS workgroup. In addition, YSCIS will email a notification of the referral to the contact email address stored within YSCIS for that service.

1. On the **Persons** page, **Referrals** tab, click Create new Referral



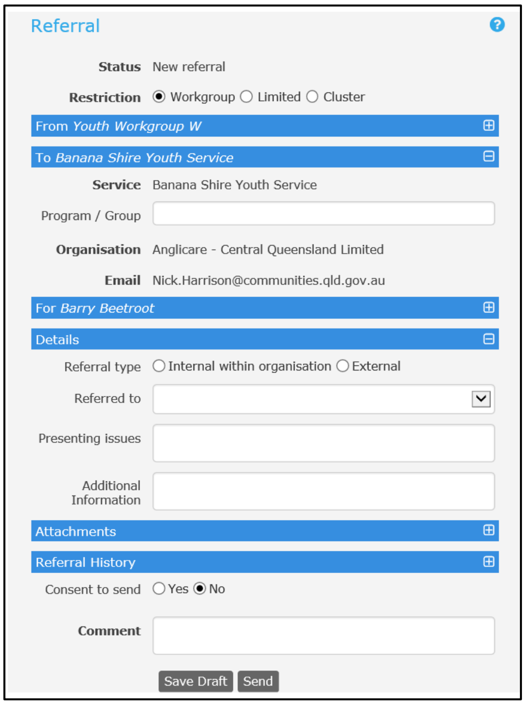
2. Select radio button for **YSCIS Services**

   In the **Send referral to** field, enter Service Name or name of organisation.

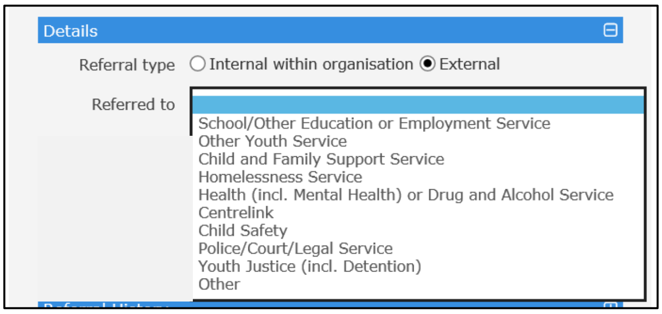


   Select required Service from the List and click **Submit**

The Referral form will now be displayed.

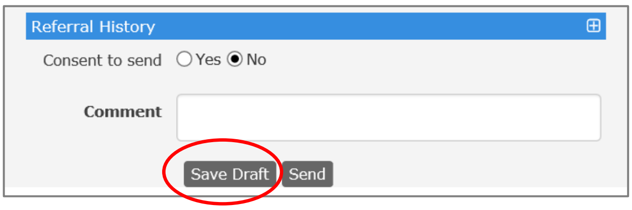


3. Complete the **Details** section :
 - identify if the Referral is **Internal** within your organisation or **External**
 - select **Referred to** value from the drop-down list

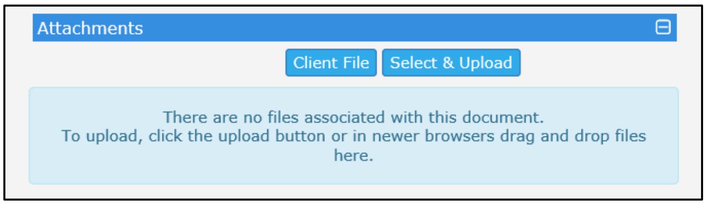


4. Record details for **Presenting Issues** and **Additional Information** to inform the receiving service about your client

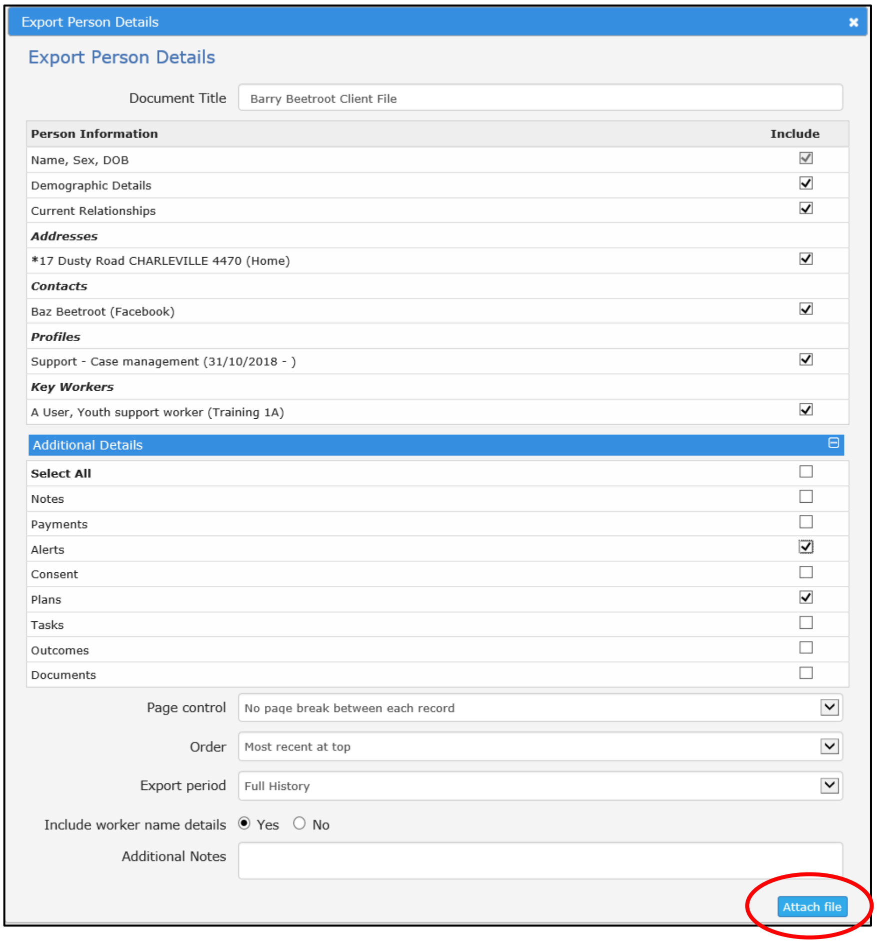
5. Click **Save Draft** at the bottom of the form.



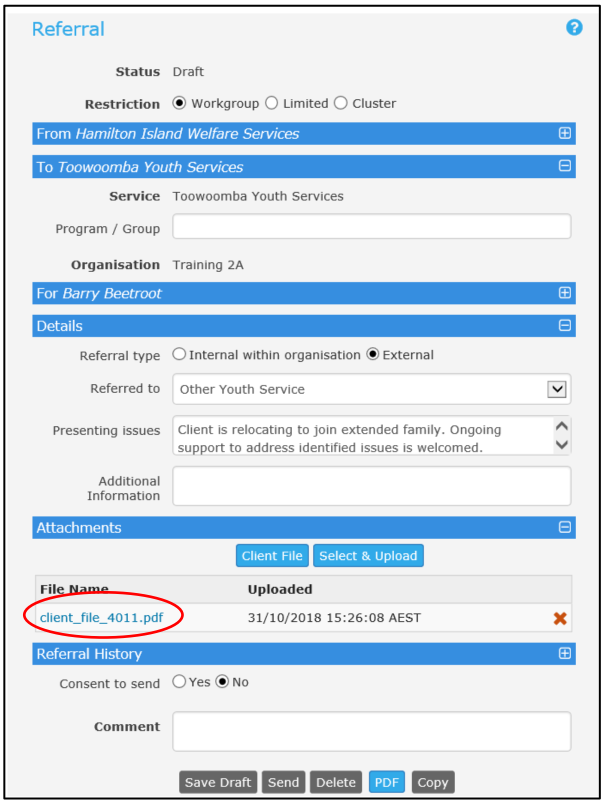
6. If documentation is required to be attached once the draft has been saved, expand the **Attachments** section by selecting the ⊞ icon.
You can select to attach documentation from the **Client File** or select files located on the user's computer (external to YSCIS).



7. Select **Client File** then select the information you wish to attach to the referral.
Select the required **Page control**, **Order**, **Export Period** options and click **Attach file**

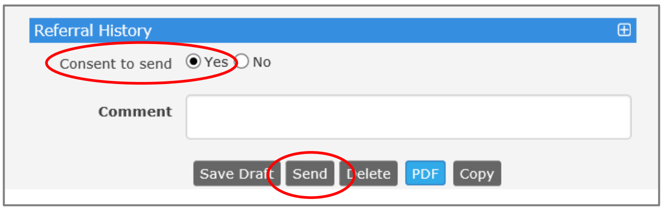


8. Attachment is now shown within the referral.



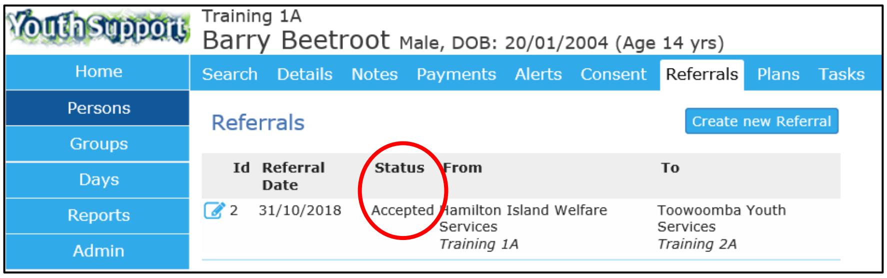
9. Consent must be obtained from your client to make the referral. Click Yes for **Consent to send**

10. If you are ready to send the referral, click **Send**



11. When **Send** is selected, the referral and associated attached information/ documentation is sent to the service provider within YSCIS. The *Status* of the referral will change from *Draft* to *Waiting*.

When that service *Acknowledges*, *Accepts* or *Declines* the referral, the Status will be updated in your workgroup.



12. Once a referral has been sent, you may **Recall** it – this is only available until the receiving service updates the *Status* of the referral.
A **copy** can be used in the instance where the user has to complete multiple referrals for a client. You can also create a pdf, which may be printed, should this be required.

10.1.2 Create a Manual Referral

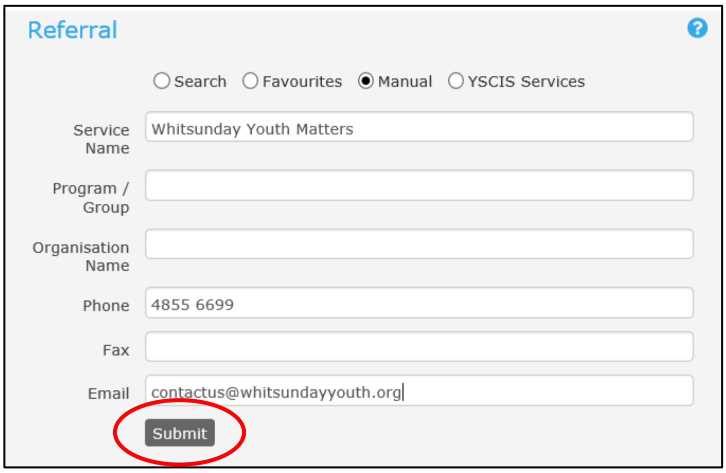
Manual referrals are used to record referrals made to non-Youth Support services or to capture light-touch referrals for a client, such as phone referrals.

For phone referrals, where documentation is not required to be sent as part of the referral, the user can complete a Manual referral to capture details. The notification to the new service provider and all associated information needs to be sent outside of YSCIS.

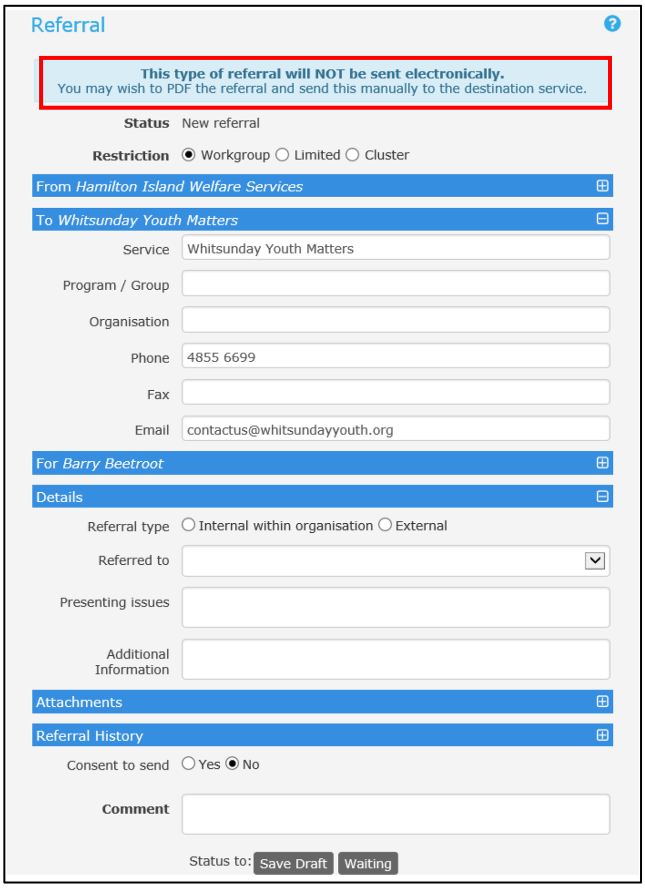
1. Select the **Persons** page, **Referrals** tab, click **Create new Referral**

2. Select **Manual** radio button

3. Enter in details of the service you are referring the young person as relevant. Click **Submit**



The following form will appear.



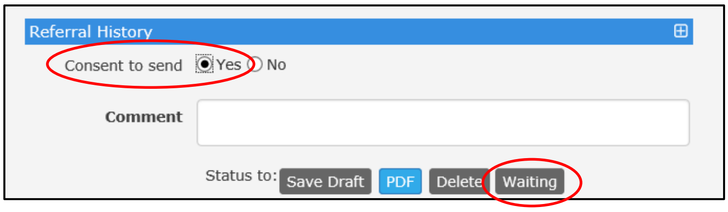
4. Complete the **Details** section :
- identify if the Referral is **Internal** within your organisation or **External**
- select **Referred to** value from the drop-down list

5. Record helpful information in the *Presenting Issues* and *Additional Information* sections

6. Click **Save Draft** at the bottom of the form.

7. Use the *Attachments* section to record any associated records you provide to this service (supporting the referral). Please refer to the relevant steps outlined in the preceding section.

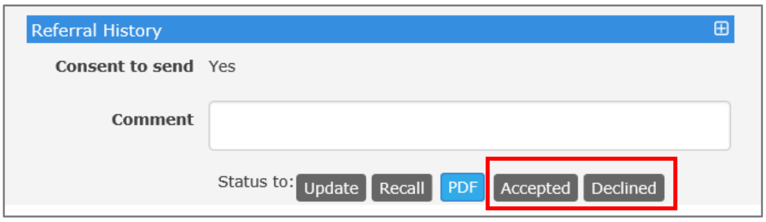
8. When you are ready to send the information to the referrer, click **Yes** for Consent to send.
Then, click **Waiting**. This will update the *Status* of the referral to *Waiting*.



9. All documentation and communication regarding this referral must be sent outside of YSCIS.

When a referral has been marked as **Waiting**, it is understood that it has been manually sent to the external service provider and you are waiting for a response from them.

The options at the bottom of the screen change to **Update**, **Recall**, **Accepted** and **Declined**.



10. After receiving advice from the service provider, update the referral to **Accepted** or **Declined**.
They can also **Update** the referral (modify) or **Recall** the Referral. A **PDF** copy of the referral can also be generated and either emailed or printed/faxed

11. Once a referral is accepted the user can create a **Copy** of the referral. This would be used in the instance where the user has to complete multiple referrals for a client.

10.1.3 Record referral using the Service Seeker database

The Service Seeker Database is a national database of service providers maintained by Infoxchange. This is independent of YSCIS. The details for each service provider contained in the service seeker database are for information only and referrals made in this manner should be treated as **Manual Referrals**, with the user manually sending the referral and documentation to the service provider.

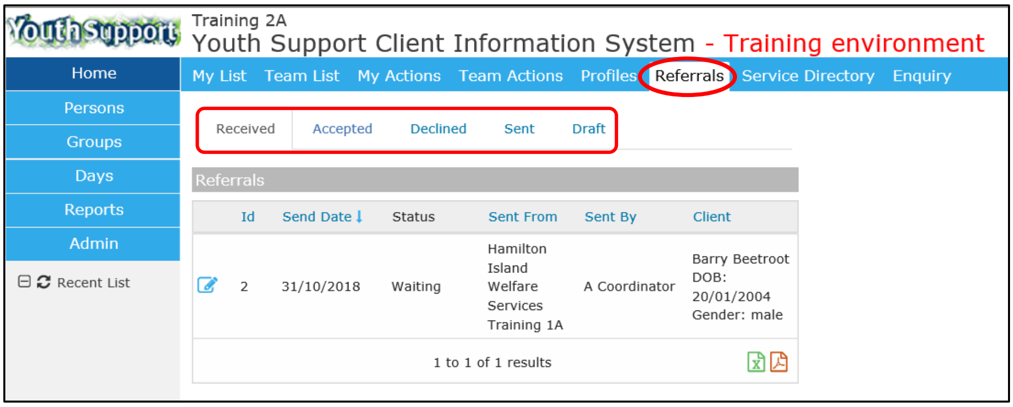
Please refer to the preceding section for guidance to record a **Manual Referral**.

10.2 Receiving referrals from another service provider

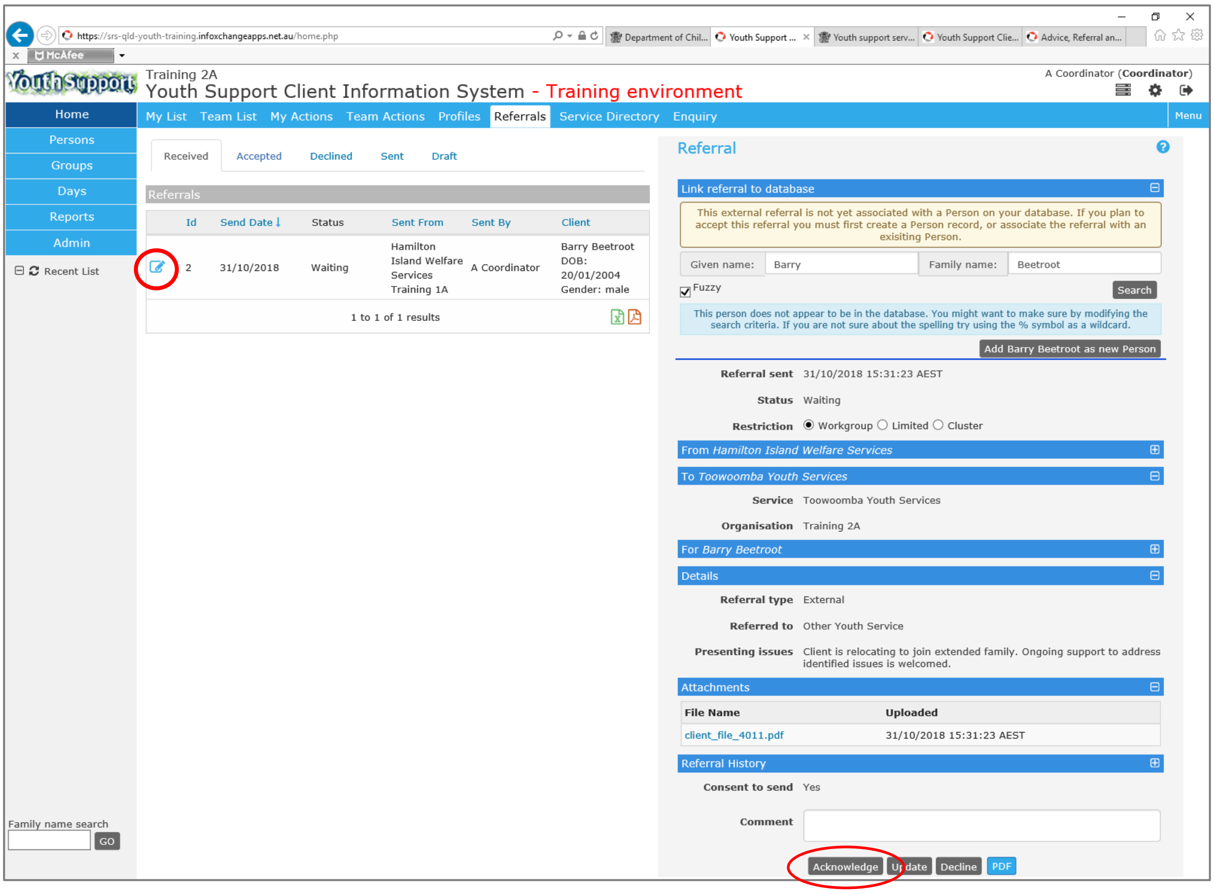
Referrals received from other Youth Support services are managed from the **Home** page, **Referrals** tab.

These referrals show on the **Received** sub-tab.
Referrals that have been Accepted, Declined, Sent or have yet to be sent (i.e. are in Draft format) can be viewed by clicking the relevant sub-tab.

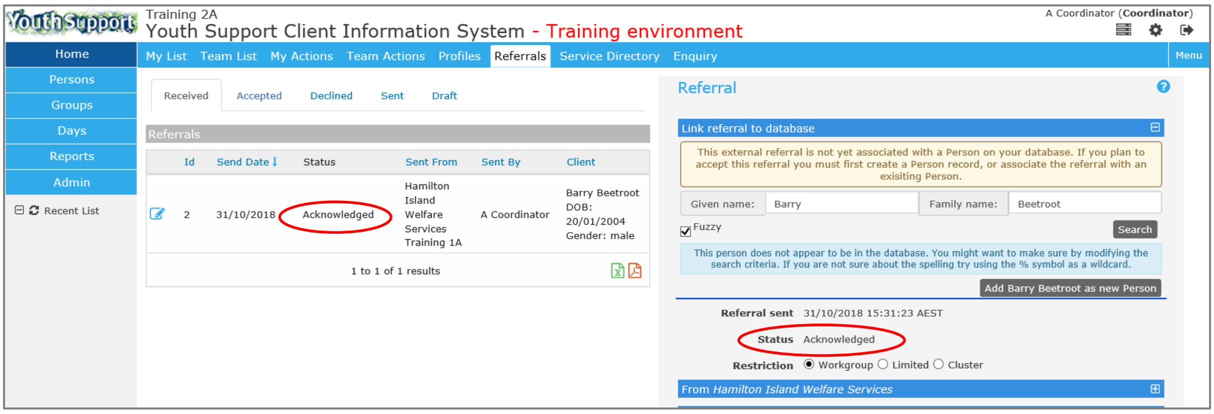
1. From the **Home** page select **Referrals** tab



2. In the **Received** sub-tab, select the icon to view/edit the details of the referral.



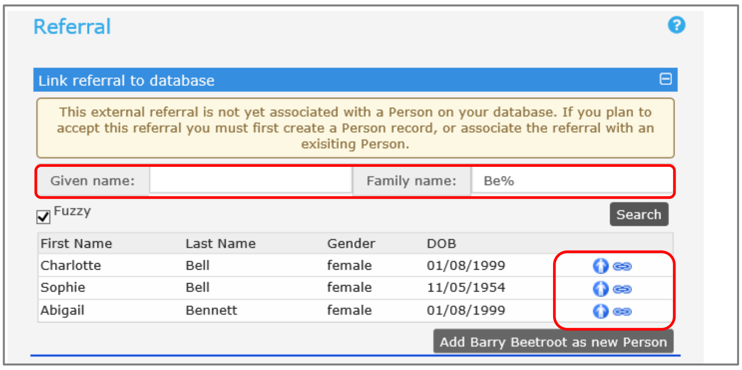
3. Click **Acknowledge** at the bottom of the Referral form, to update the *Status* of the referral – indicating you are aware of and are processing this referral.



4. The procedures developed by your service to determine whether to *Accept* or *Decline* the referral occur at this point. A review of the client_file attached to the referral will inform this decision.

5. **To accept the referral**, as indicated by the message in the yellow box, it must be associated with a Person record.

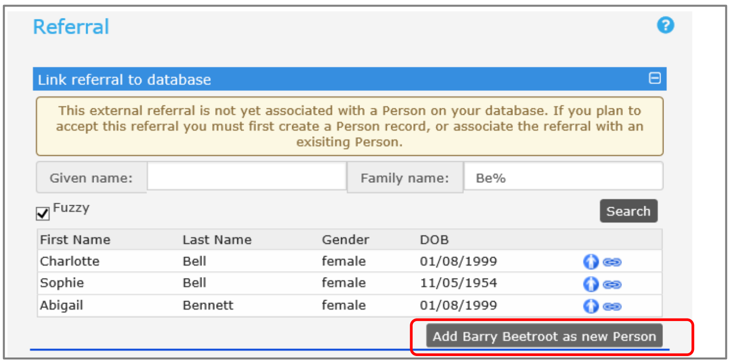
It is important to perform a wide search to identify if a Person record already exists for the referred client: use the % wildcard on a short version of the Given Name **or** Family Name, click **Search**.



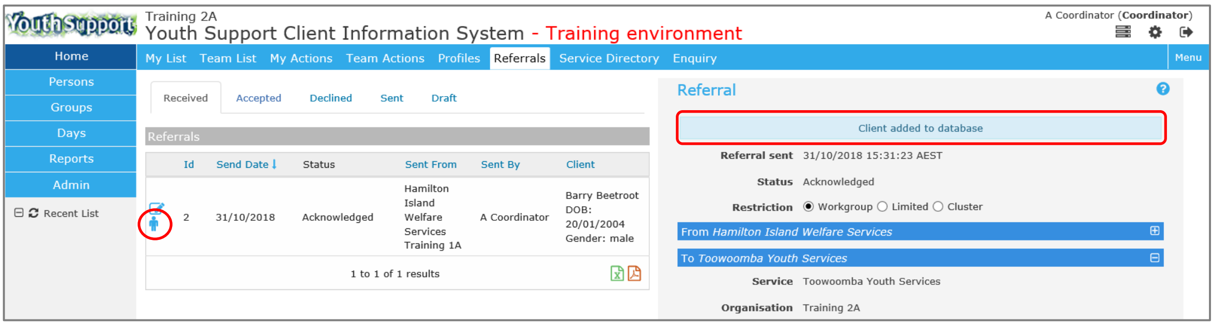
Where a potential match is identified, it displays as above.
Click the person icon to check the current record in your workgroup to confirm if it is the same person.
Note: you will need to navigate back to the **Home** page, **Referrals** tab to resume processing your referral (this may display is a separate tab in your browser).

Where a Person record already exists for the client in the referral, click the link icon.

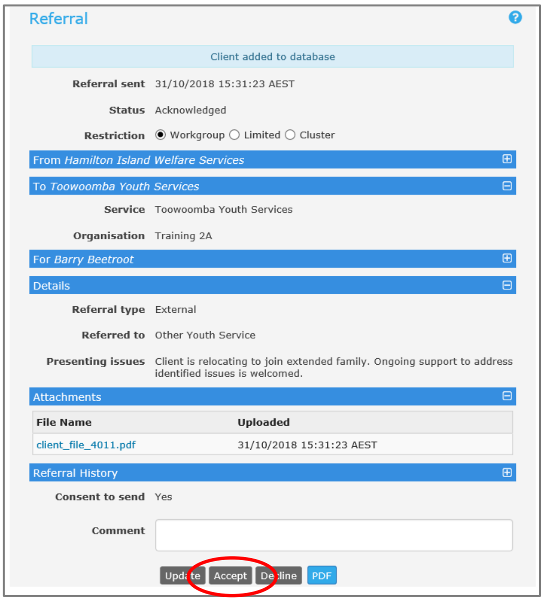
6. If there is no existing Person record for the client, click **Add <Name> as a new Person**.



7. A blue message will display at the top of the referral form and a blue person icon will appear in the referral record to the left. You can click on this icon to open the Person record. Certain details will have been automatically populated in the record. You may like to include other information, where relevant, from the client_file (attached to the referral).

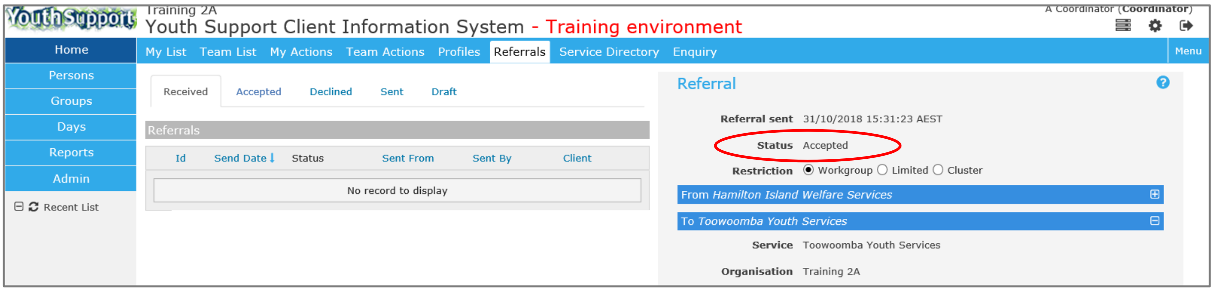


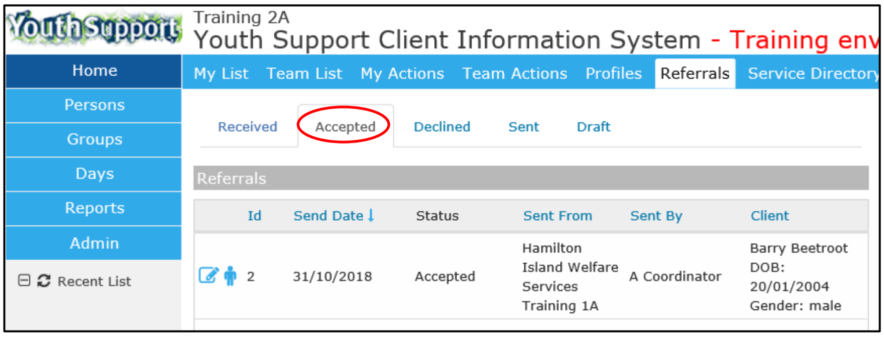
8. You are now able to select the **Accept** button at the bottom of the referral form. This will update the *Status* of the referral.



9. The *Status* is updated in your workgroup and in the workgroup that sent you the referral.

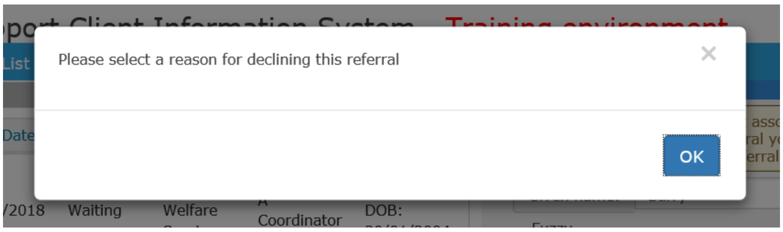
The referral record is now located on the **Accepted** sub-tab of the **Referrals** tab (on the **Home** page) <u>AND</u> on the **Referrals** tab of the **Person** record.

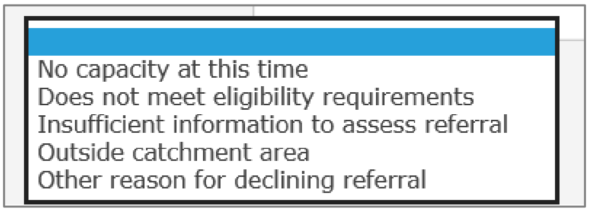




To decline the referral:

If you are not going accept the referral, click **Decline** at the bottom of the referral form. You will be required to select a *Reason for declining* the referral





Click **Decline** to save.

11 Working with more than one young person at a time

Youth Support service delivery is directed to ensuring that young people receive individualised support and assistance consistent with their assessed needs. However, there may be instances that young people are engaged in the company of other young people to provide a targeted response for common identified goals/actions within their respective plans.

YSCIS provides a functionality (**Groups** on the **Groups** page) to record occasions where a worker/workers are engaging with more than one young person when delivering a youth support service response. These responses should always involve at least two, if not more, young people who are clients of the service and for whom a client record and case profile are created. If only one client is contacted this would be an individual case note, not a group.

Examples of Group scenarios are outlined below:

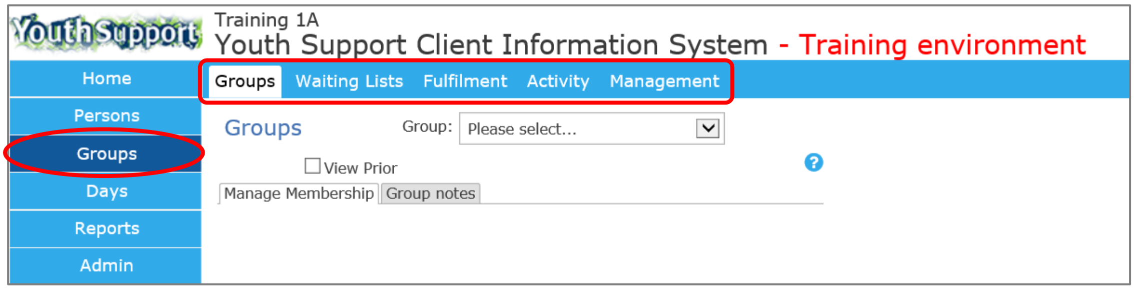
Example 1
Four young people with case plans attend a 4 x 1 hour program on anger management delivered by two workers. Each session is captured using the **Group Notes** functionality, with the individual young people linked to it, so that the group case note appears in each client's record.

Total output hours equates to 4 direct contact hours for each worker. The group type in this instance would be captured relevant to the case type of the majority of clients participating whether 'support' or 'integrated response'. The individual persons receiving a service in the period is captured through the case profile, not the group functionality.

Example 2
Your service is aware that there are a number of disengaged and vulnerable young people regularly gathering at a local beach. Your service decides to outreach to location to engage these young people to facilitate their access to support. When in contact with the group of young people, three young people accept referral information/or offer of warm referral as access clients and one spends some time with one of the workers on the side sharing some challenges they are experiencing and accepting an offer of ongoing support.

This activity would be recorded in YSCIS as follows:
- Client/Person records would be created with Access profiles/cases for the 3 access clients.
- a Group for the *Outreach @ Beach* would be created and these 3 clients added as members of that Group
- A single Group Note would be recorded detailing what information was provided – this Note copies across to and is visible on each of the 3 Person records.
- A client and Support – Case management profile/case would be created for the young person who was contacted and accepted the offer of ongoing support. This would be recorded as an individual case note as they did not participate in the Group.

The **Groups** page contains **5** tabs:



- **Groups**: to manage group sessions delivered by your service. ***Group Notes*** are created for activities pertaining to the delivery of that group activity, recognising attendance and capturing worker time spent on these activities.

- **Waiting Lists**: to track clients who may be waiting for a particular service.

- **Fulfilment**: to create a mailing list of clients who share an interest or have expressed an interest in receiving particular information. You can also use this group type to create invitation lists for clients who share common demographic characteristics.

- **Activity**: to record activities that are not groups and/or do not involve client participation.

- **Management**: to create new Groups – retains a register of all items created.

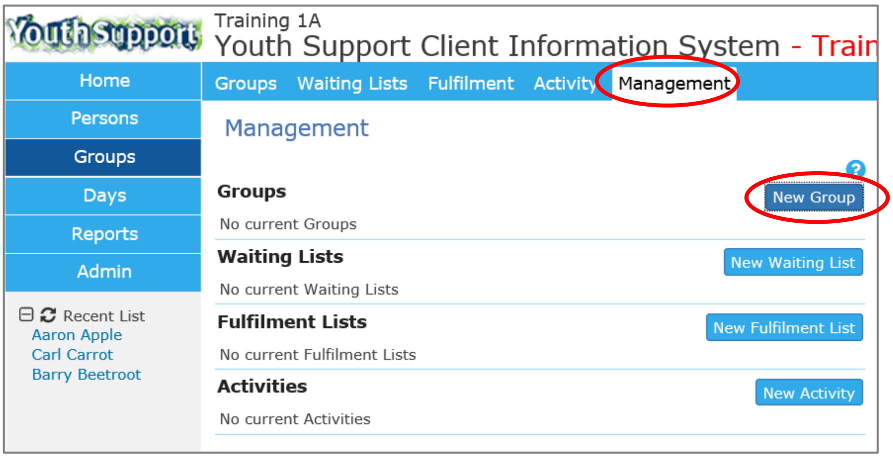
Waiting Lists, Fulfilment and Activity are standard features from the Infoxchange SRS product. For guidance on using this functionality, click on the Help icon to access SRS Help.

There are 3 steps to create and manage groups provided as part of service delivery with young people.

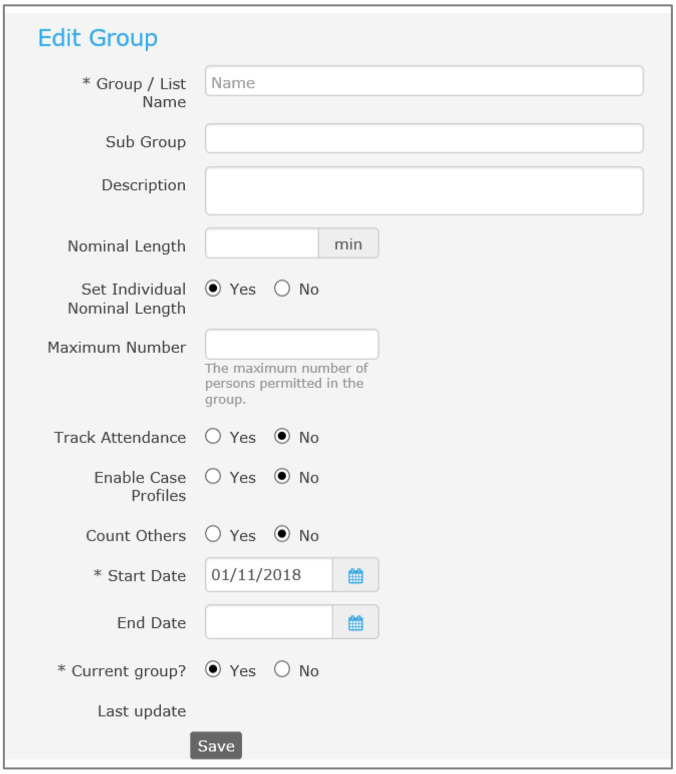
These are outlined in the following pages.

11.1 Create a New Group

1. From the **Groups** page, on the **Management** tab, click New Group

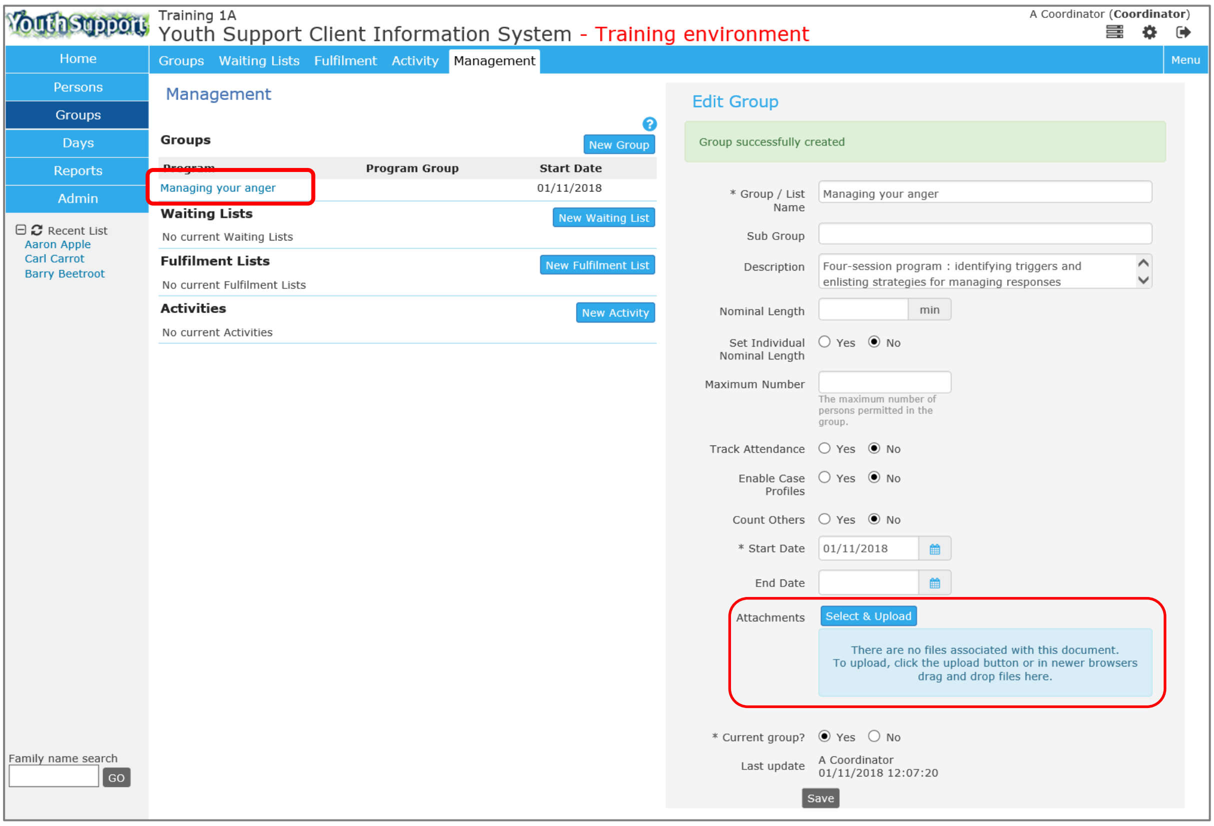


2. Complete details on the Edit Group form and click **Save.**



- *Group / List Name* is the name of your group sessions/program.
- *Description* is used to record the purpose / scope of the group sessions.
- *Nominal Length* is not a mandatory field. If a value is entered here, it will pre-populate the Contact time field on the Group Note template for this group. It is recommended that this field is left blank.
- *Set Individual Nominal Length* should be set as '**No**' to ensure accuracy of recording service hours.
- *Maximum Number* can be used to help manage the number of participants in the group - selecting this will provide messages. It does not limit adding members

- *Track Attendance* – if 'Yes' is selected, a brief *Attendance Note* will display on the Membership tab for each Person record listed as a member of the Group. Please refer to **What does Track Attendance do?** section below to inform your choice.
- *Enable Case Profiles* – select 'No'.
- *Count Others* – select 'No'. If 'Yes', a box will appear to record the number of non-clients who attend a session to be recorded.
- *Start Date* – defaults to today's date – when this Group record was created in ARC.
- *Current group?* – defaults to 'Yes'.
- Click **Save.**



Additional Notes:

- You only need to create one Group template for sessions that are held on a regular basis. Individual Group Notes for that Group will record each session that is held and other activities undertaken in association with that Group.

- You are able to edit/update the details of each Group from this tab, at any subsequent time.

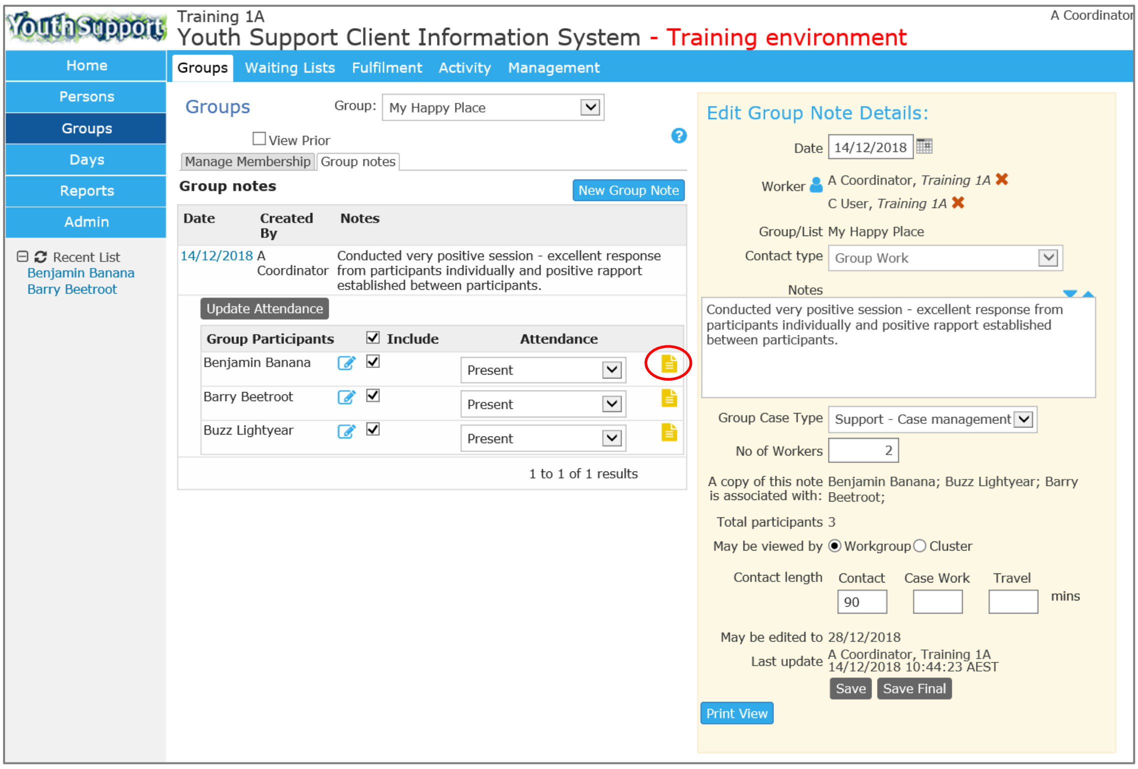
- Any relevant documents are able to be attached to the Group template.

- A Group will remain active until it is closed. This is achieved by recording an End Date in the Group template (this will auto-update Current group? To No). The record remains accessible via the View Prior button.

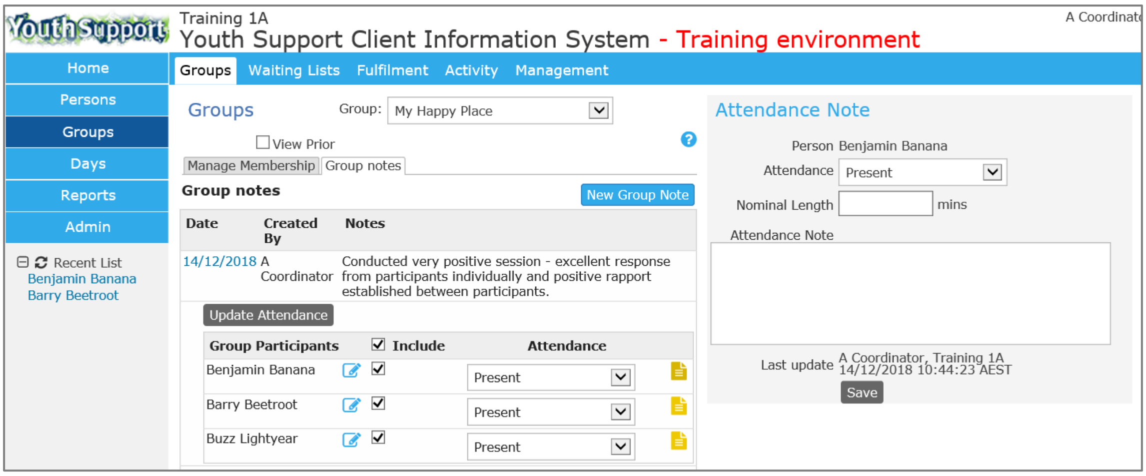
What does **Track Attendance** do?

Track Attendance is standard SRS functionality.
Where **Track Attendance** is selected as *Yes* (when creating the Group), an *Attendance Note* is created for all Group Notes recorded for that Group.

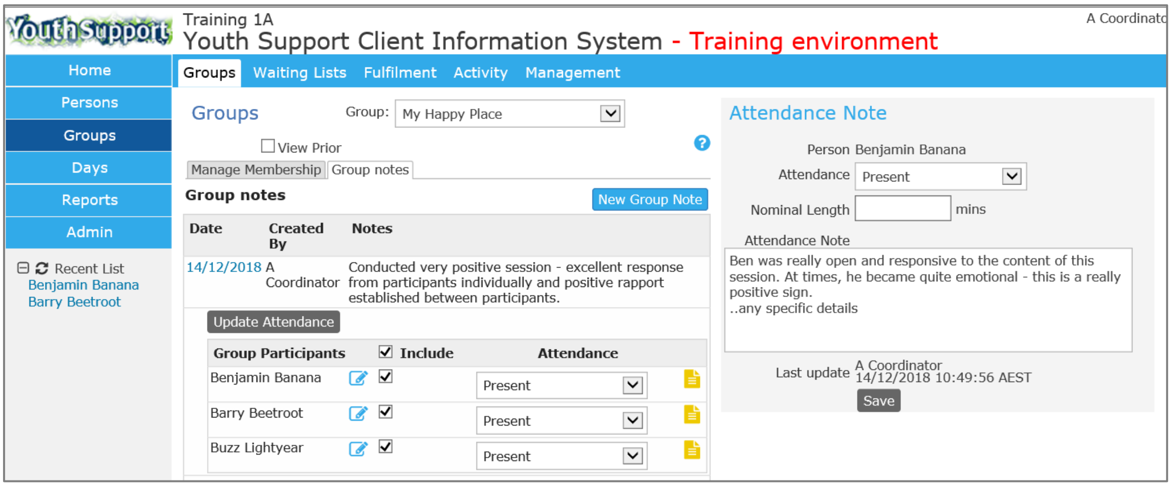
On the **Group Notes** sub-tab, the icon links to the Attendance Note that has been created.



Click this icon to open the Attendance Note for that Person.

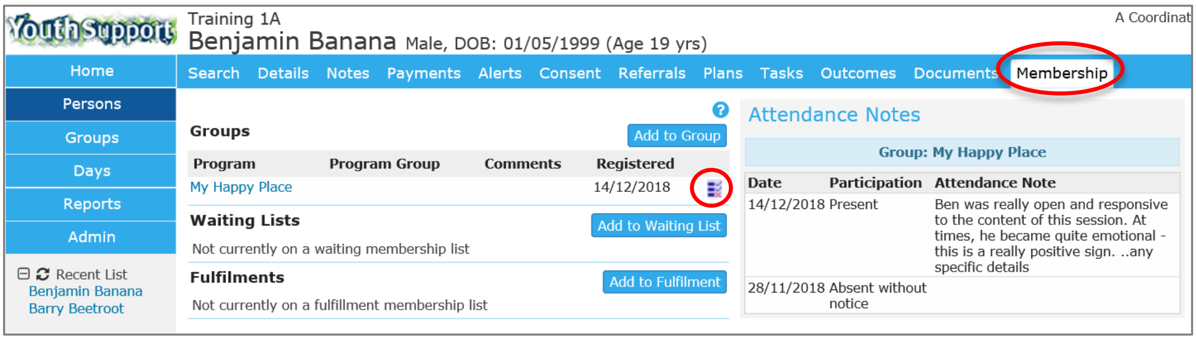


Enter any comments .Click **Save**.



The Nominal Length field does <u>not</u> record your time. It is recommended this is left blank.

On the **Person** record, **Membership** tab, the *View Attendance record* icon  will appear for those groups where it was set-up.
An Attendance Note will appear for **ALL** Group Notes created, <u>not</u> just for those the Person attended.

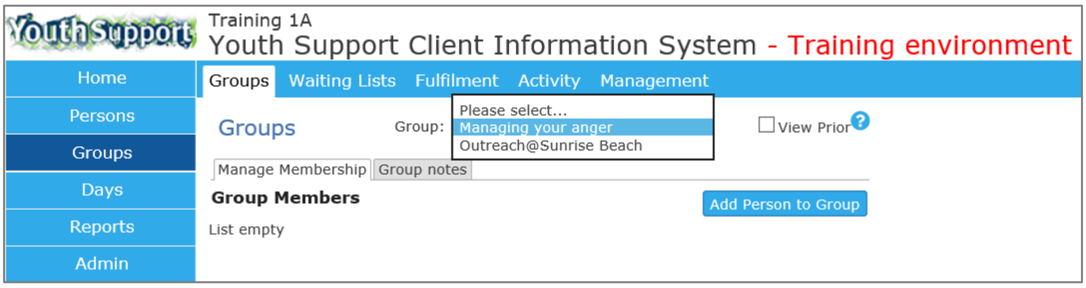


Services need to assess the value of this.

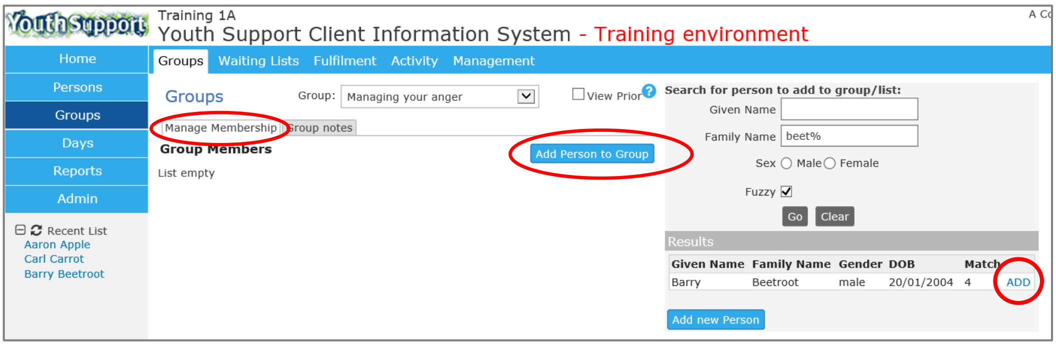
If Track Attendance is set to ‘No’ (when the Group is created), the *Attendance Notes* icon does not appear on the Membership tab for each member. A copy of the Group Note where *Update attendance* is recorded **is** copied to the relevant Person record.
Please refer to **Record a Group Note** section (Section 11.3) below for more information.

11.2 Add a Client to a Group

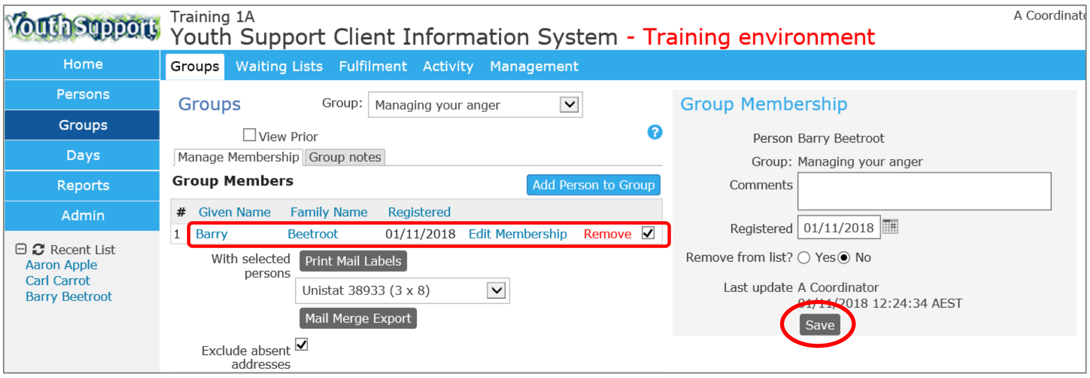
1. From the **Groups** tab, select the required **Group** from the drop down list



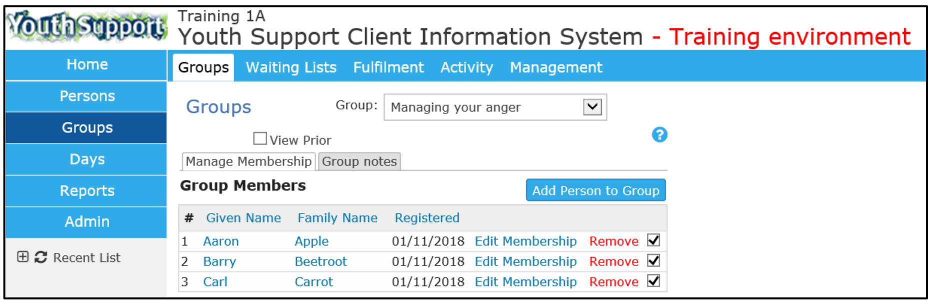
2. On the **Manage Membership** sub-tab, select **Add Person to Group**. Search for person, click Go. Click **ADD** for each relevant client.



3. Add any comments, if relevant, and click **Save**



4. Repeat the above steps to add the required clients to the Group.



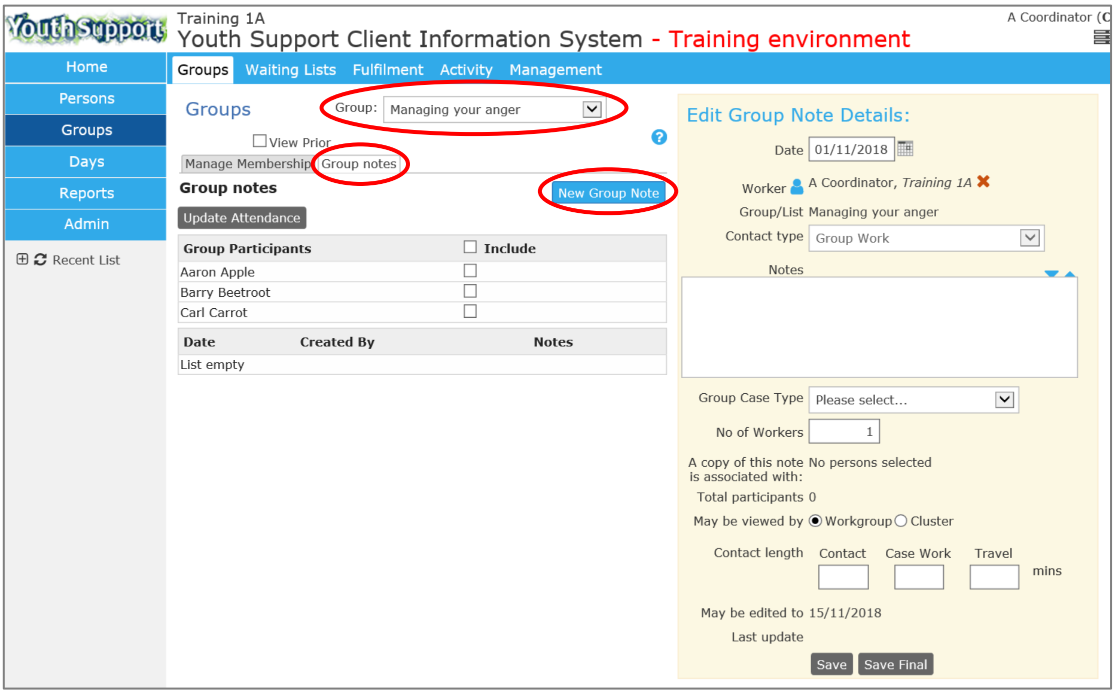
To remove a client from a Group, simple click Remove.

11.3 Record a Group Note

Activities performed in delivering group sessions are recorded using the Group Note feature.

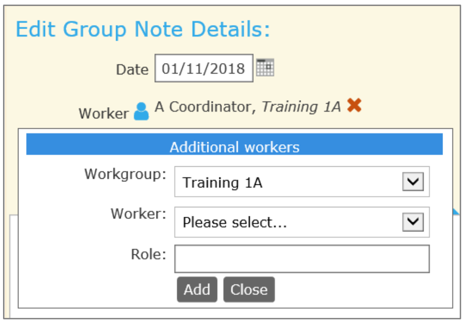
1. On the **Groups** tab, select the required group from the drop down list.

2. Select the **Group notes** sub-tab. Click **New Group Note**

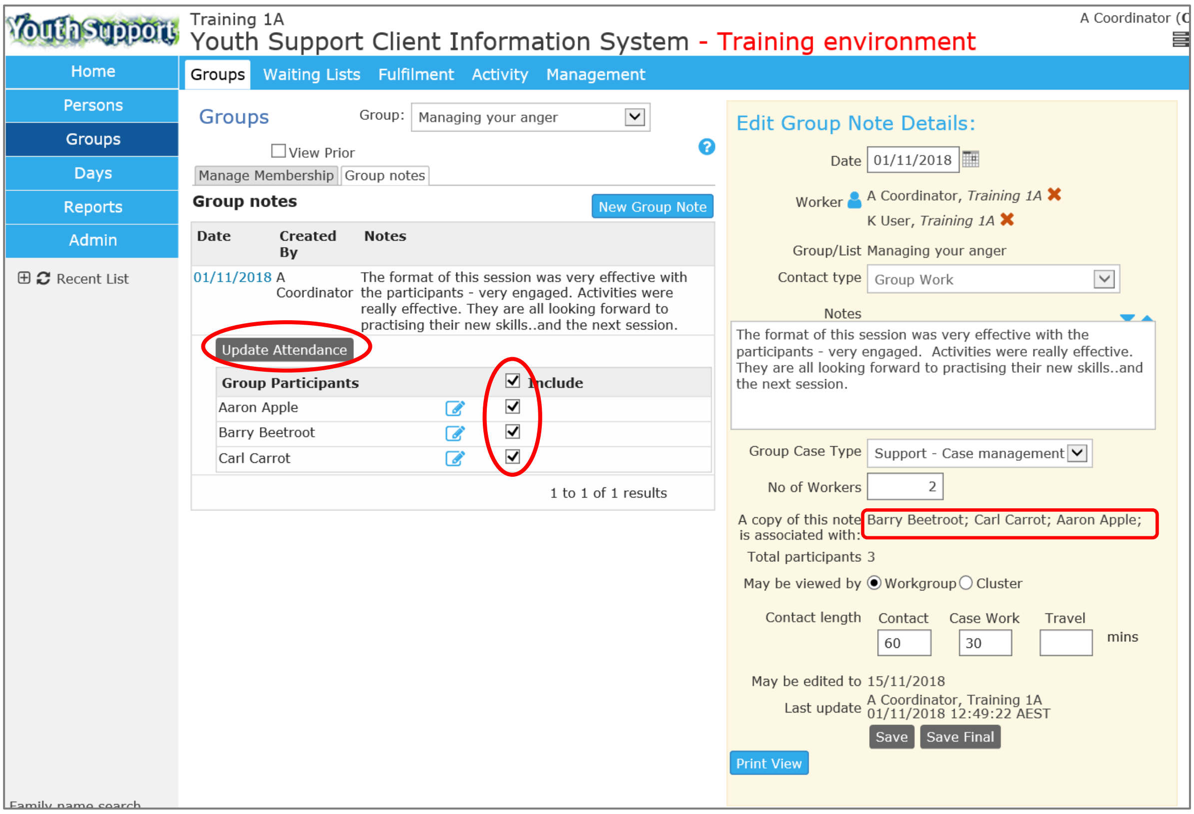


3. Complete the fields as relevant:

- record the **Date** of the activity
- Add other workers if involved in the activity – click on blue person icon

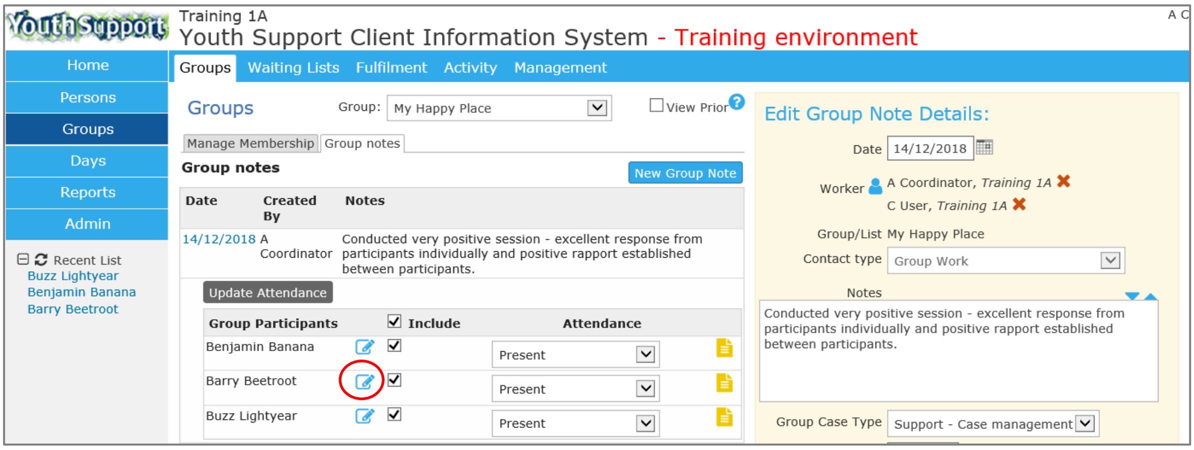


- record Notes
- to record attendance, click the checkbox for 'Include' for each client and then click **Update Attendance**. Their names are now attached to this Group Note.
- select Group Case Type
- record the number of workers (see notes for Counting Rules below)
- record activity time for Contact, Case Work and Travel as relevant.
- click **Save**.

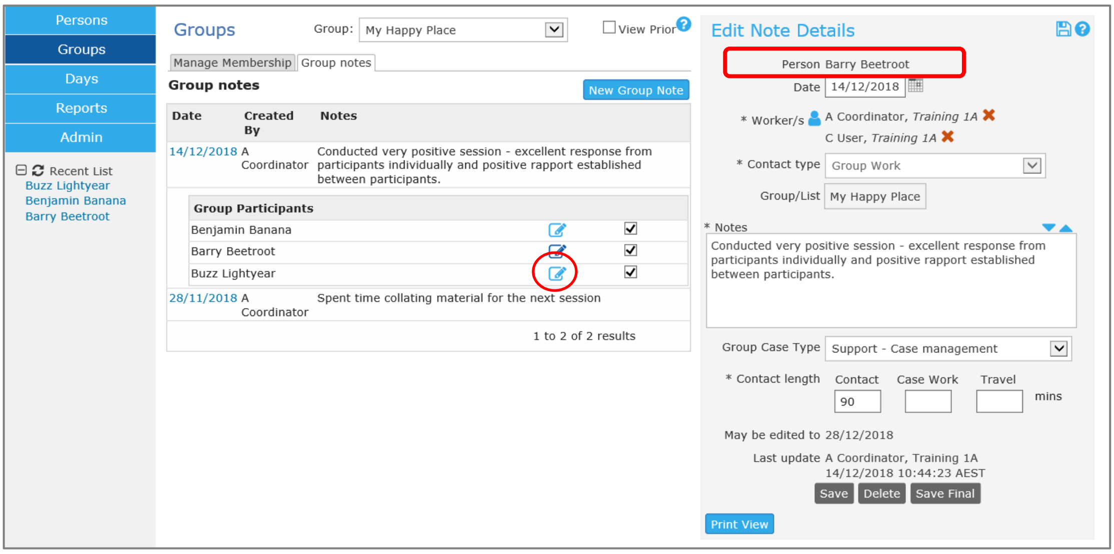


Additional Notes:

» A copy of the Group Note will be added to each client's record where they were marked as 'in attendance'.
This can be accessed by clicking the blue crayon or from the Person page, Notes tab.

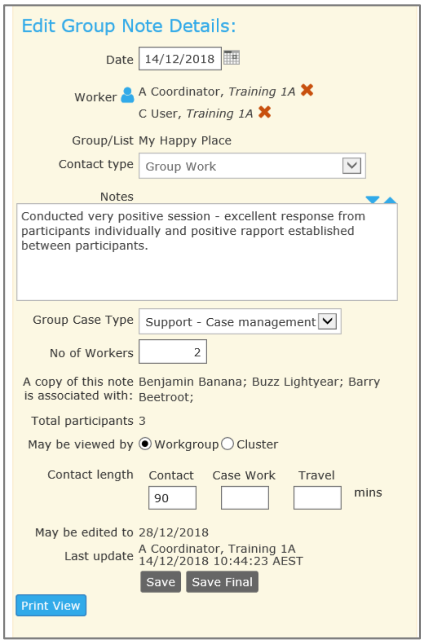


The copy of the Group Note for that Person will open on the right hand side of the screen, in a gray template. (The Group Note displays in a yellow template.)



That Note is also able to be accessed from the Person record, Notes tab :

» The Group Note counts service hours for performance reporting.
By way of example, for the Group Note below, 2 workers facilitated a session attended by 3 clients for 90min (1.5hrs)


Edit Group Note Details:

Date 14/12/2018

Worker A Coordinator, *Training 1A*
C User, *Training 1A*

Group/List My Happy Place

Contact type Group Work

Notes

Conducted very positive session - excellent response from participants individually and positive rapport established between participants.

Group Case Type Support - Case management

No of Workers 2

A copy of this note is associated with: Benjamin Banana; Buzz Lightyear; Barry Beetroot;

Total participants 3

May be viewed by Workgroup Cluster

Contact length Contact 90 Case Work Travel mins

May be edited to 28/12/2018

Last update A Coordinator, Training 1A 14/12/2018 10:44:23 AEST

Save Save Final

Print View

The *DCSYW Performance Report* recognises the time for **both** workers for the relevant service type.

Outputs

Service Type No.	Service Type Name	Measure No.	Measure Name	Response
T103	Access – Information, Advice and Referral	A01.1.06	Number of hours provided during the reporting period	
T103	Access – Information, Advice and Referral	A01.1.06	Number of Service Users who received a service during the reporting period	0
T314	Support – Case management	A01.2.02	Number of hours provided during the reporting period	3.00
T314	Support – Case management	A01.2.02	Number of Service Users who received a service during the reporting period	3

12 Closing a Case

With the completion of your work with the young person, their case/profile must be closed.

Closing a case involves the following 4 steps:

» Close **Consent**

» Close the **Case Plan**

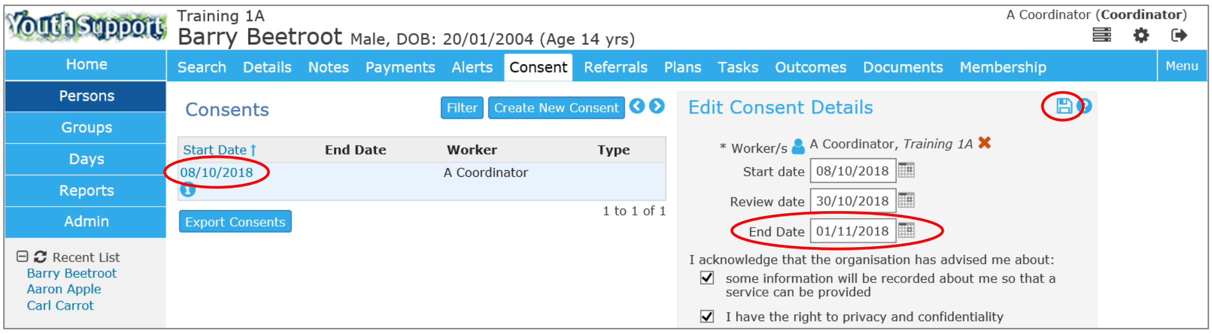
» Close the **Key Worker**. This avoids the client appearing in the worker's 'My List' on the Home page

» Close the **Case Profile.**

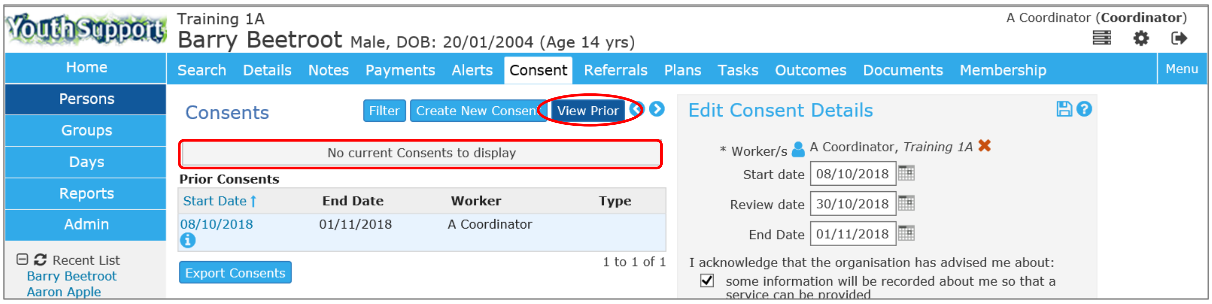
12.1 Close Consent

1. From the **Persons** page, select **Consent** tab.

2. Open the Consent record (by clicking on the blue date) – enter **End Date** and **Save**.



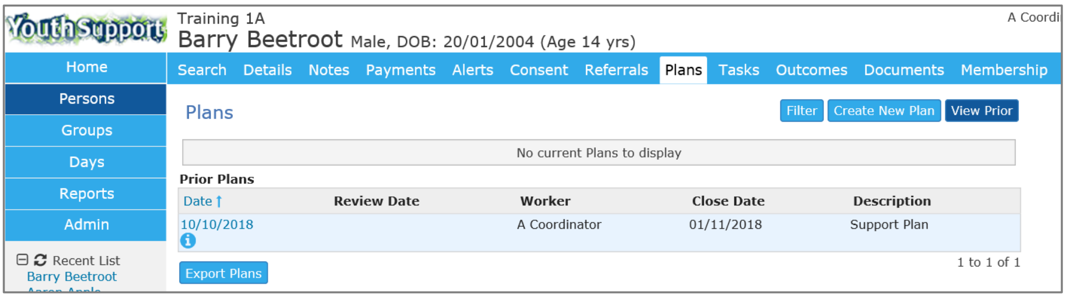
The Consent record is saved as a Prior Record – simply click the **View Prior** button to display / access.



12.2 Close the Case Plan

1. From the **Persons** page, **Plans** tab, open the current Plan.

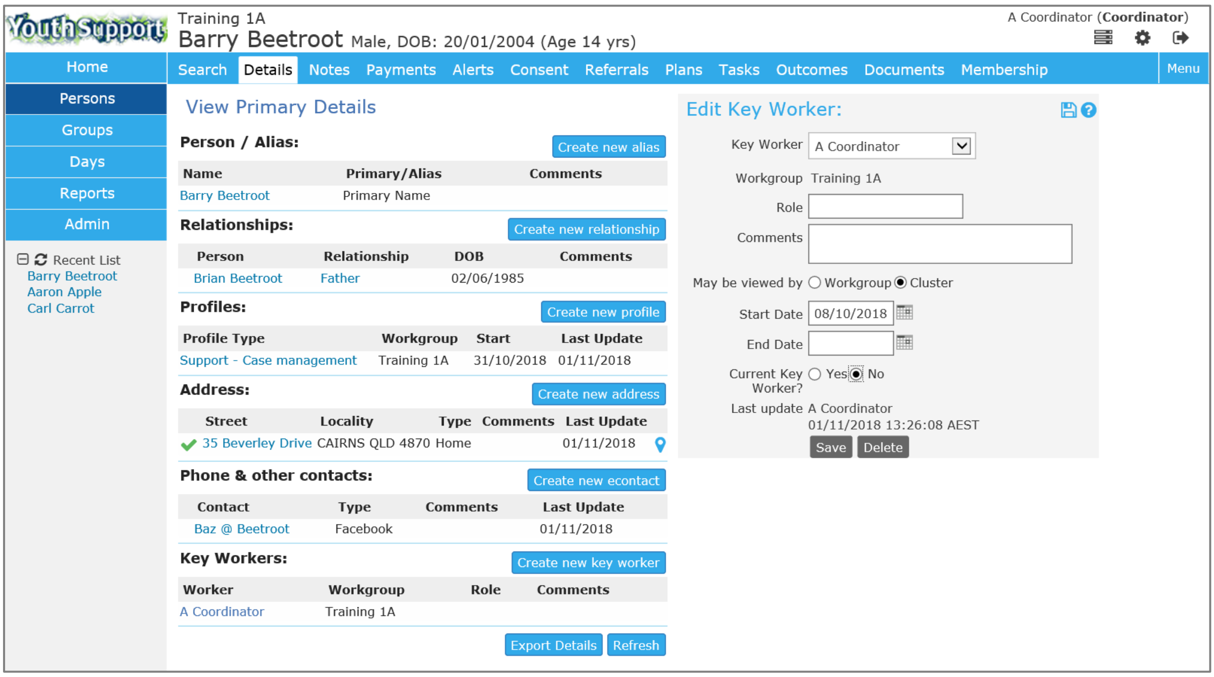
2. Review Actions to ensure accurately updated.
Enter a **Close date** for the Plan. Click **Save**



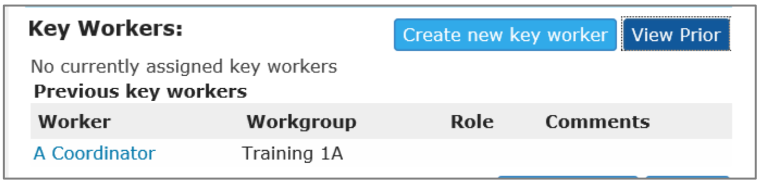
12.3 Close the Key Worker

1. From the **Persons** page, **Details** tab, open the **Edit Key Worker** form.

2. Enter an **End Date** (or click No to ‘Current Key Worker?’ – this auto-populates the end Date) Click Save.



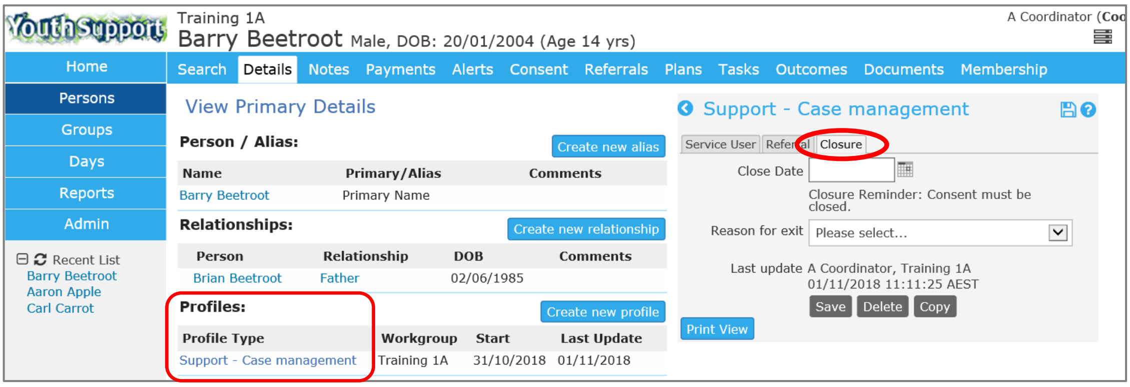
The record is available as a Prior record – accessed by clicking on **View Prior**.



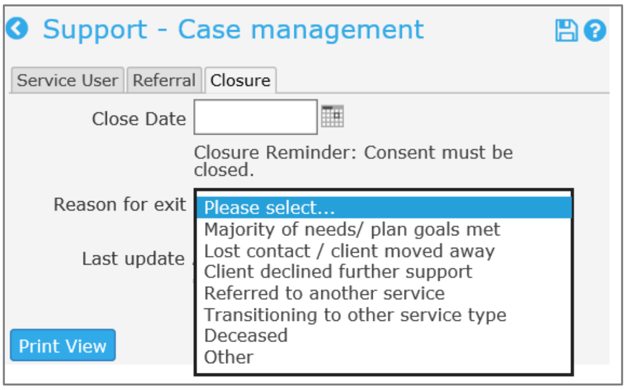
12.4 Close the Case / Profile

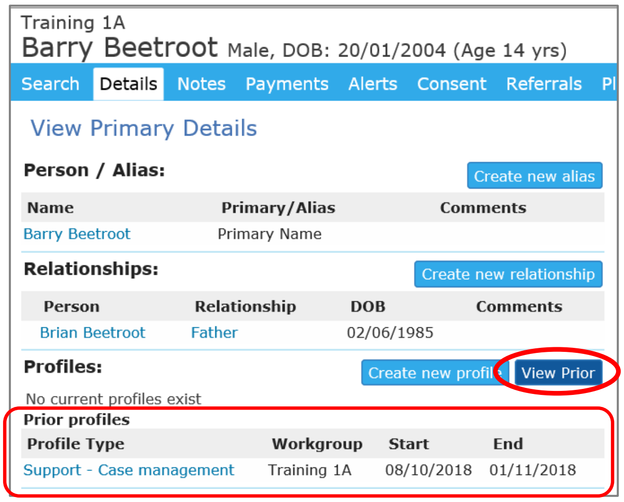
1. From the **Persons** page, **Details** tab, open the current Case/Profile.

2. Click the **Closure** sub-tab.



3. Enter a **Close Date** and select *Reason for exit* from the drop down list. Click **Save**.





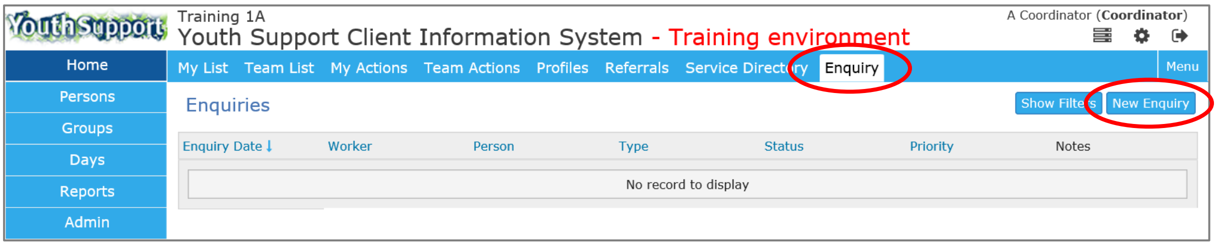
The Case / Profile record is saved as a Prior Record – simply click the **View Prior** button to display / access.

13 Enquiries

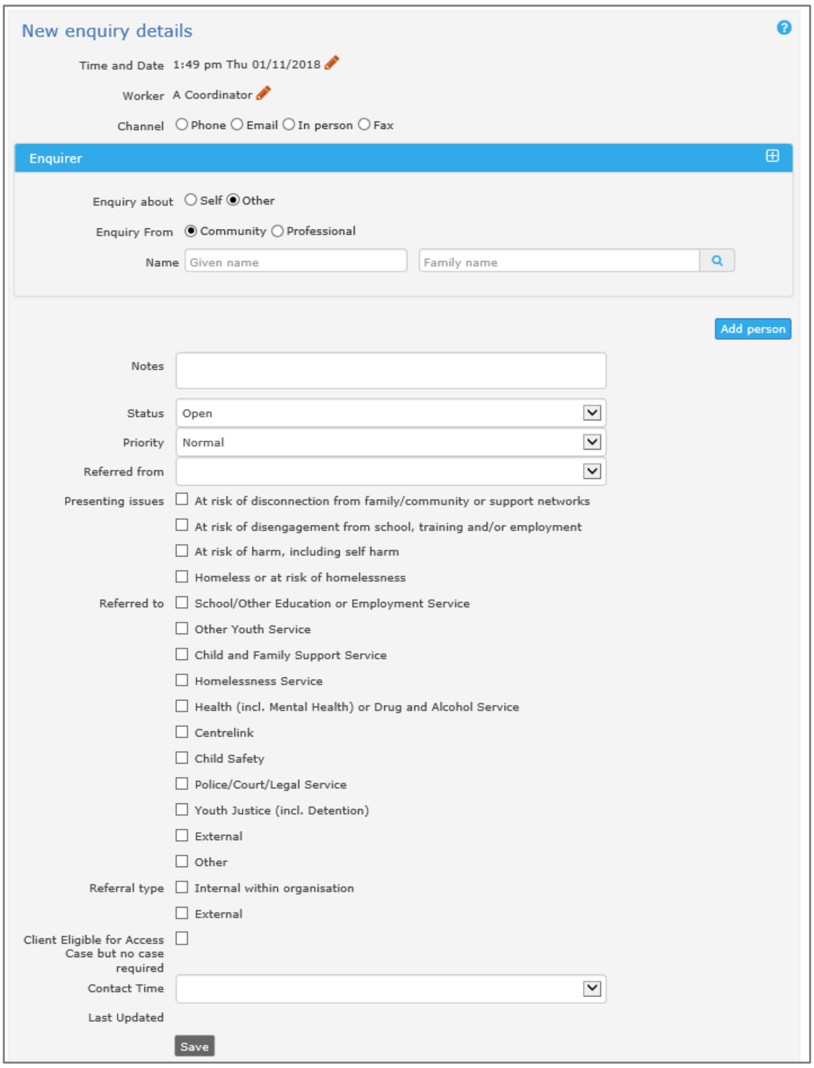
YSCIS allows workers to record simple light touch enquiries via the **Enquiry** Tab on the **Home** Page where the response does not warrant the creation of an Access case, or where the client is not eligible for service (e.g. outside age range).

If an enquiry and the work generated by an enquiry progress past 60 minutes, cancel the Enquiry and create a client record with a Case Type.

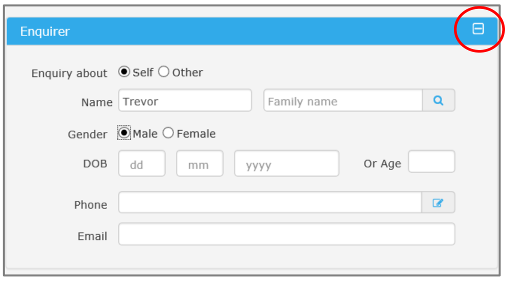
1. From the **Home** Page select the **Enquiry** tab.
   To create a new enquiry, select **New Enquiry**.



2. The New enquiry details form will open.



3. Enter details about the Enquirer. If you have a name you can enter it here however it is not mandatory to have a name. Other identifying details can be added by clicking on the  button highlighted in the screenshot below.



4. Refer additional notes for information on adding a person or linking to an existing client

5. In **Notes,** record relevant details

6. Select relevant **Status**, either Open (new), Responding (in progress, this would be used if you need to step away from your computer for a time) or Closed (finalised/complete)

7. Select the **Priority** and record where the client was **Referred from**

8. Record the **Presenting Issues** (multi-select available)

9. Record where the client was **referred to** (multi-select available) and whether this was a referral internal within the organisation or to an external provider/source (multi-select available, refer additional notes)

10. If the client is eligible for an Access Case but no case is to be created (e.g. the support provided via the enquiry was sufficient) then check the **Client Eligible for Access case but no case required checkbox**, this is ensure they are picked up in performance reporting

11. Record a **contact time** from the list of values. If the contact time exceeds 60 minutes, the enquiry should be cancelled and a case created for the person.

12. Click **Save**.

Additional Notes:

» To cancel an Enquiry before it is saved, simply click the Home page.

» You can create a Person record from the Enquiry if you wish. If you are going to create a case for the client cancel the enquiry and follow the steps in the section Add a person

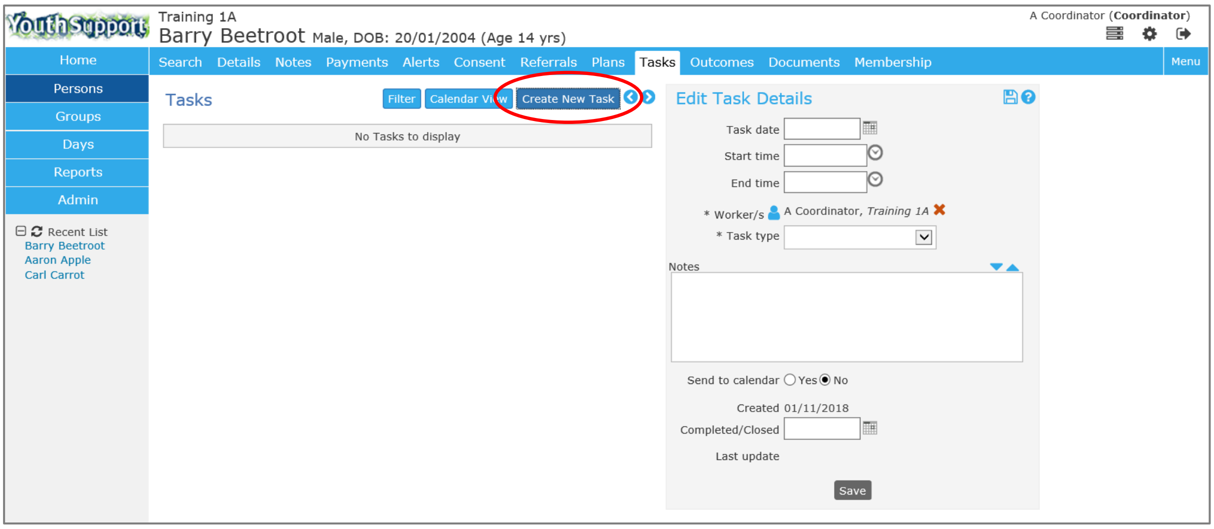
» Where you are referring a young person to both an Internal (within Organisation) and External service provider, these can be recorded on the same Enquiry.
This will feed into the *DCSYW Performance Report* for your service, specifically IS148 & IS149

14 Tasks and Alerts

14.1 Create a Task

A task is an action, generated from a client record which is assigned to a worker within your workgroup. Tasks will display on the workers **My Actions** tab on the **Home** page.
Tasks can be sent to Outlook.

1. On the **Person page,** (the client record), select the **Tasks** tab.
   Click Create New Task.



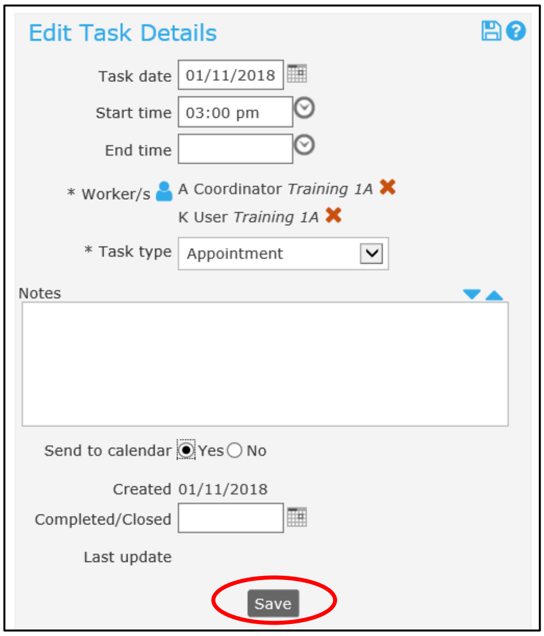
2. Enter **Task date** and time

3. Select Worker/s. Will default to current user, to add more workers select the icon

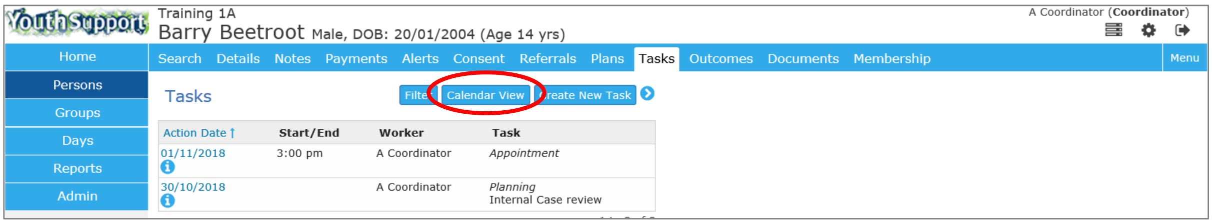
4. Select **Task type** and add any comments.

5. Select **Yes** to **Send to calendar** if the task is to be sent as a Microsoft Outlook calendar invitation. All workers associated with the task will receive a Microsoft Outlook calendar invitation if their email address has been supplied via their user preferences details.
The comments field is the only information sent to the Outlook invite. No other data is included in the invite. For this reason, users wanting to send the task to Outlook may decide to include information in the comments field which will also be relevant in the invite.

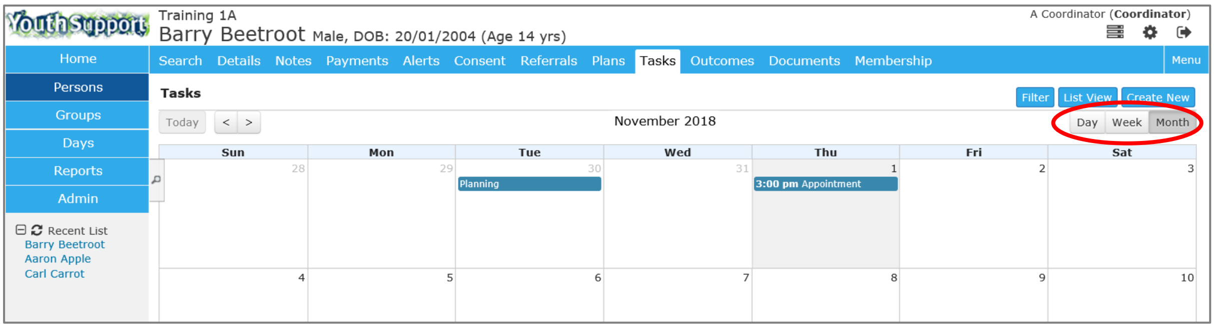
6. Enter completed/closed date if applicable and select **Save**. To modify the Task click on the Task and the edit screen will display on the right hand side. Update the details and select **Save**



7. From the **Tasks** tab, select the **Calendar View** button



8. Tasks can be viewed in different formats/presentations by selecting the **Day**, **Week** or **Month** buttons (highlighted below)



Additional Notes:

» Once a Task has been completed, enter the date in the **Completed/Closed** field using the calendar icon. This must be done to stop the record appearing on your **My Actions** tab.

» You can filter the tasks list by clicking **Filter** and selecting the date range, type or worker.

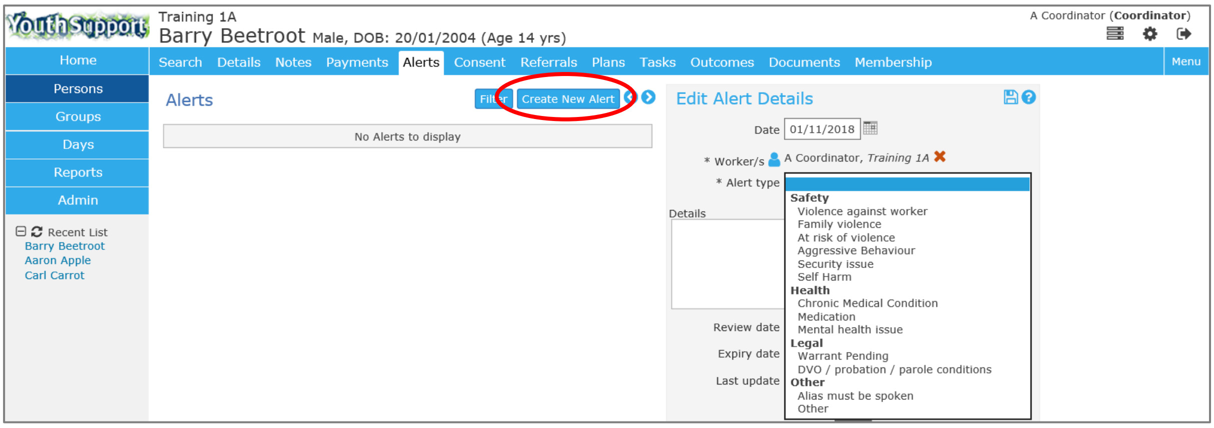
» A user with YSCIS Coordinator access level is able to delete a task record.

14.2 Create Alerts

The **Alerts** tab is used to create and manage alerts to notify other workers of potential safety risks, health risks or other issues of concern in relation to a particular client.

1. From the **Persons** Page, select the **Alerts** tab

2. Select **Create New Alert**



3. Enter **Date** of Alert. This auto-populates to today's date - can be backdated.

4. **Worker/s** - defaults to the user entering the alert record.

5. Select the **Alert type**

6. Enter **Details** of Alert

7. Enter a **Review date** (this will cause a task to appear in the worker's **My Actions** tab when due) – this auto-populates to a 3-month period.

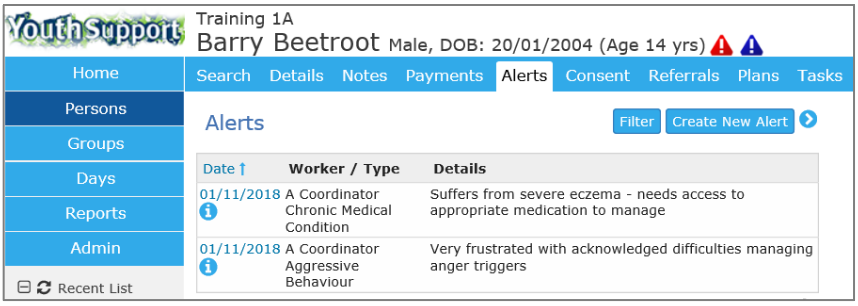
8. Enter an **Expiry date** (this will cause a task to appear in the worker's **My Actions** tab when due) – this auto-populates to a 6-month period.

9. Select **Save**. To modify the Alert, select the Alert from the list screen and update as required then select **Save.**

10. Once you create an alert, a warning icon will appear next to the person's name (highlighted above). The icon will be red if the alert relates to safety and blue for all other alerts. Once the alert expires, the warning icon will no longer be visible in the banner.

Additional Notes:

» A user with YSCIS Coordinator access level is able to delete an alert record.



15 Documents

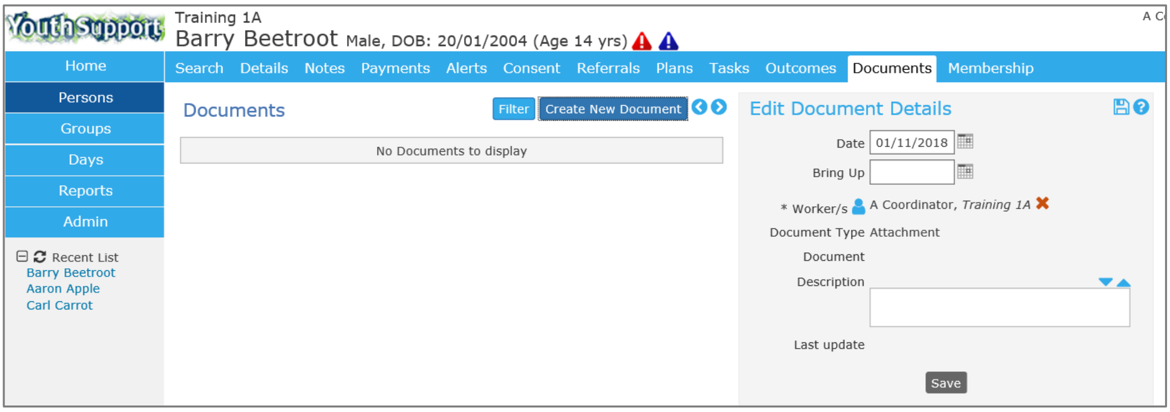
Documents may be associated with a Person record in two ways:

- **Attachment** - any file, up to a maximum of 5 MB, can be attached to a person record.
- **Merge** – For guidance using this standard SRS functionality, please refer to Online Help guidance.

15.1 Adding Documents

1. From the **Persons** page, select the **Documents** tab

2. Click **Create New Document**. The Edit Document Details form will appear to the right of screen.



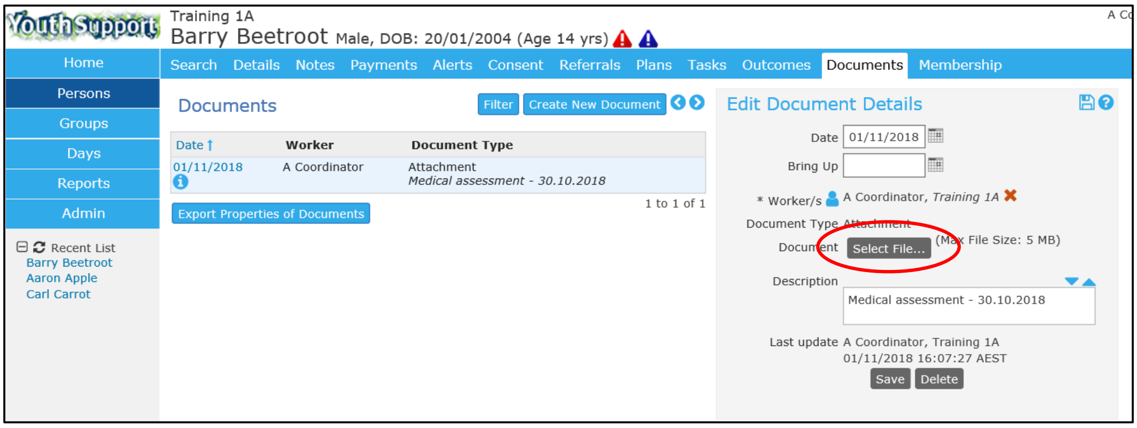
3. Select the **Date** by clicking the calendar icon – auto-populates to today's date.

4. Enter the **Bring Up** (review) date by clicking the calendar icon – if relevant.

5. The **Worker/s** icon will auto-populate to the worker attaching the document.

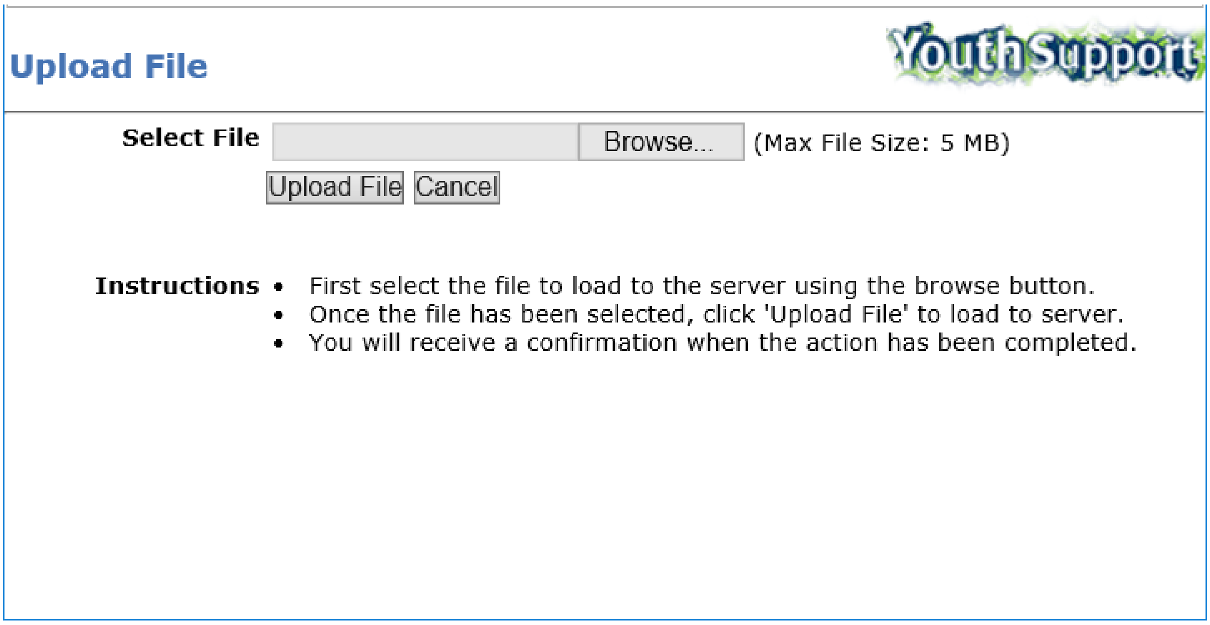
6. Add a **Description** of the document. (This description will be displayed in the Documents list)

7. Select **Save.**



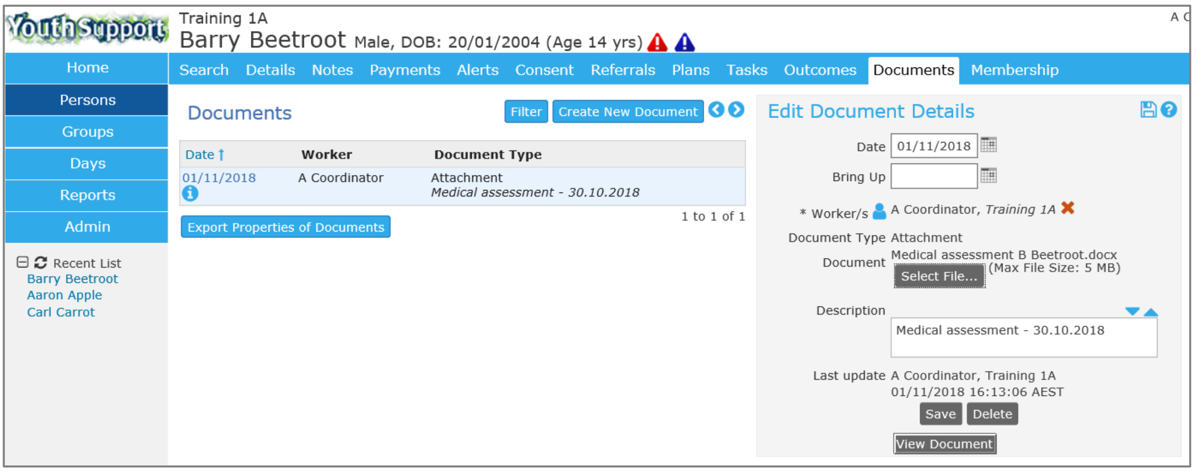
The **Select File** will now display, enabling you to attach the required document.

8. Select **Select File**... and the following dialog box will appear.



9. Select **Browse** and locate the file you would like to upload.

10. Click **Up Load File**. The document will be attached to the person record and the filename will be displayed in the Document field.



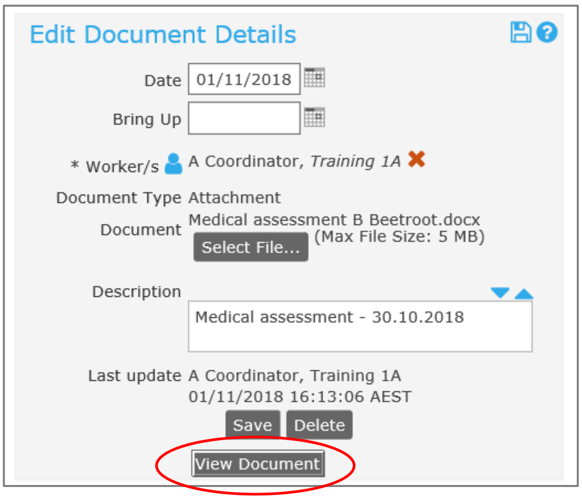
Additional Notes:

» Only one document file can be uploaded for a document record. If you want to attach multiple documents, you will need to create multiple document records.

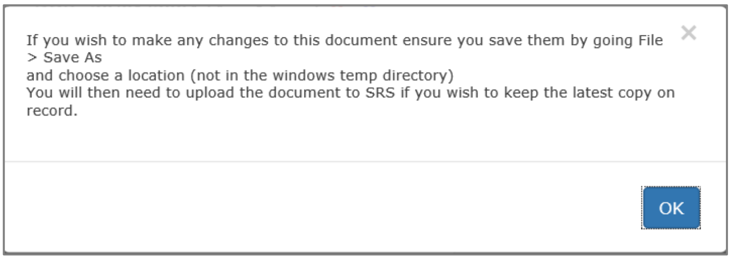
» A user with Coordinator access level is able to **delete** a document record.

15.2 Viewing & Changing Documents

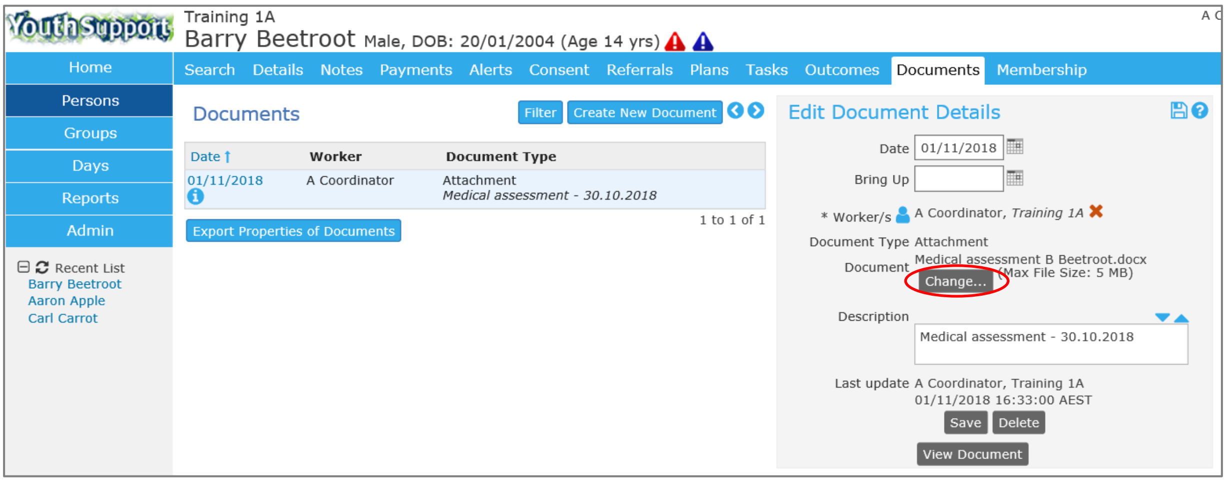
1. To view the document, click **View Document**



2. Please note that if you make changes to the document, the changes will not automatically be saved in the attached document. You will need to save the modified document to your network or local PC and then reattach the modified document.

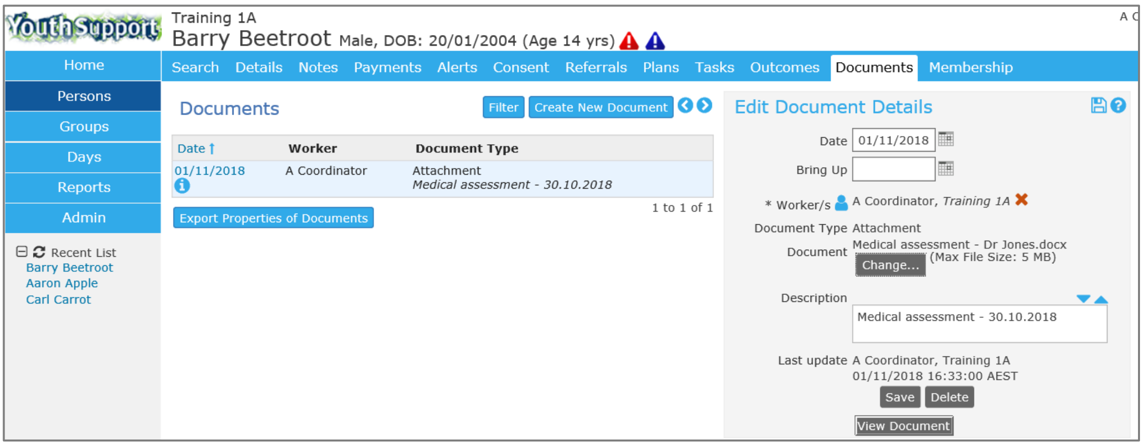


3. To change the document attached to the Document record, click **Change**.



You will be prompted to Browse and Upload the required file.

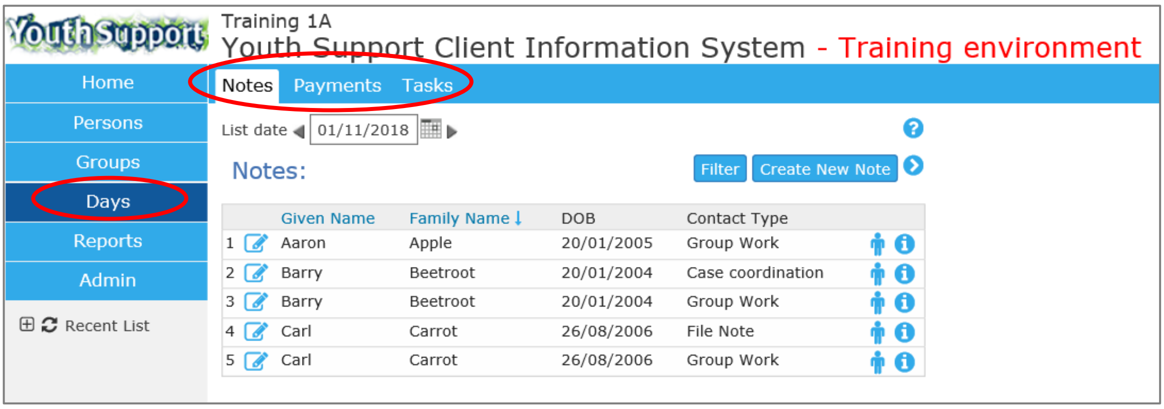
4. The new document will be attached to the Document record and the filename will be displayed in the Document field. The old document will be removed.



5. Click **Save** to save the document or **View Document** to view the document before saving.

16 Days Page

The **Days** page provides an alternative view for Notes, Payments and Tasks created on a particular day.



16.1 Navigating within the Days Page

When you select a tab (Notes, Supports or Tasks), the records displayed will default to show those for the current date.

You can navigate through the days by clicking the left and right navigation arrows or by selecting a date via the calendar icon.

Click the icon to open the record. Click the icon to open the Person record.

Hovering over the information icon displays a summary of the record's information. The Filter can also be used to refine search parameters.

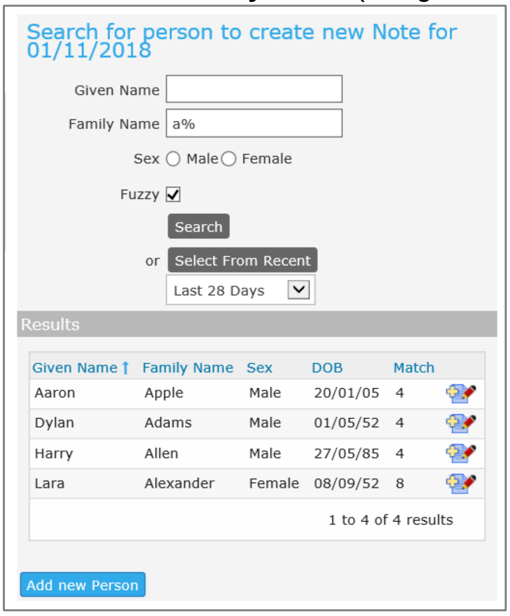
Note: If a Note or Task is associated with more than one Person, it will display multiple times.

16.1.1 Creating a New Note from within the Days Tabs

1. On the **Notes** tab, click **Create New Note**.

The Search for person to create new Note for form will appear to the right of screen.

2. Enter the **Given Name** and/or **Family Name** (using wildcard %) and click **Search**.



3. If a record already exists you will see a list of records under **Results** – as above.

4. If a record does not exist you will see ‘No matches to your search’ under **Results**. Click Add new Person to create a new Person record.

5. Click the **Add New Note** icon  beside the appropriate record.

6. Enter Note details into the Note form. (See Creating a New Note for information on entering Note details)

7. Click **Save** or **Save Final**. **Save** allows you to enter a review at a later stage and edit. **Save Final** completes the review and you are unable to edit any further

8. Once you have created a new Note, it will appear in the Notes list on the left of screen.

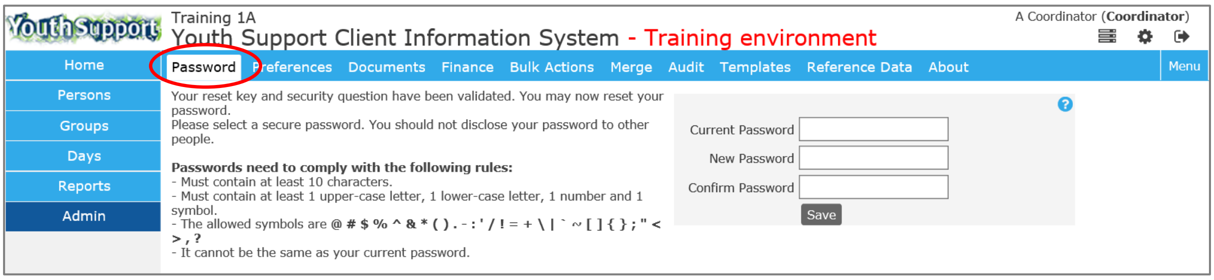
17 Admin Page

The tabs within the **Admin** page allow users to manage their logon, email address and other details used within YSCIS.

Users with a Coordinator access level will have additional tab access to manage user accounts and perform other administrative functions as detailed in the Coordinator Functions section of this Manual.

17.1 Change Password

On the **Admin** page, select the **Password** tab.



1. Enter your **New Password** and enter again in the **Confirm Password**. The password should be at least ten characters in length.

2. Click **Save**. Your password should now be updated.

Additional Notes:

- When entering password details, a system assessment of the password strength will be displayed. It is recommended that a password with a 'Strong!' strength level is entered.

17.2 User Preferences

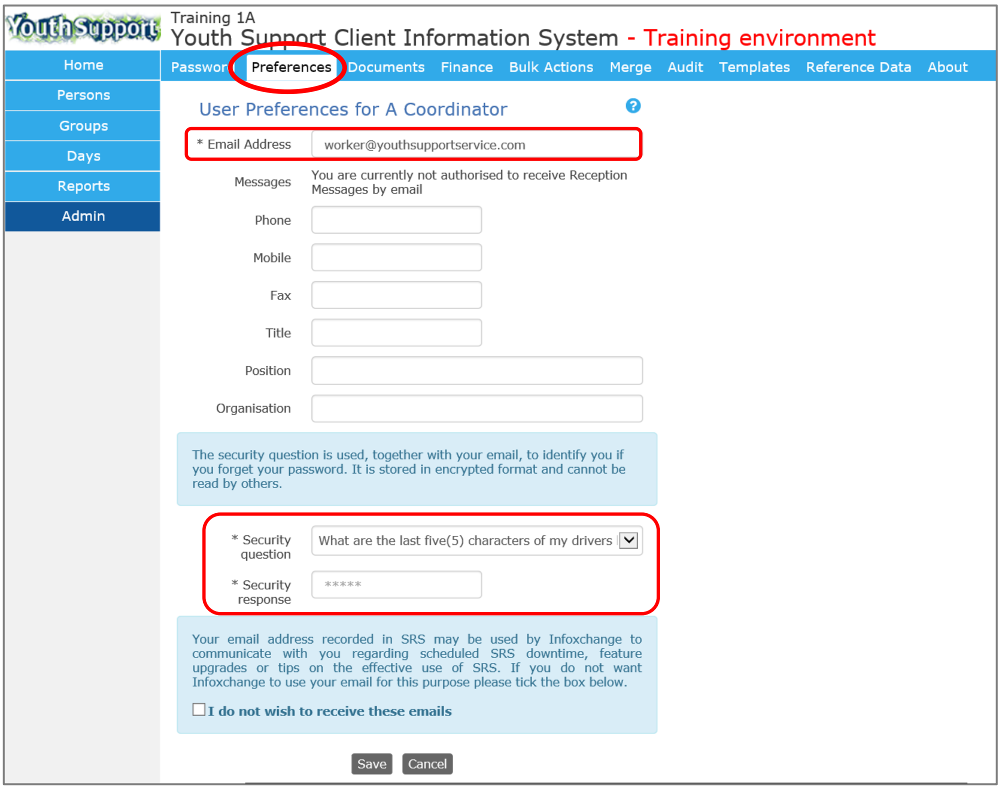
The **Preferences** tab enables users to update their user account and contact details.

When logging on to YSCIS for the first time, the users will be directed to the **Preferences** tab to update their **Email Address, Security question and Security response.**

This information is used for identification should users forget their passwords and wish to make use of the Password Resetting function. Alternatively, your YSCIS Coordinator will be able to reset passwords.

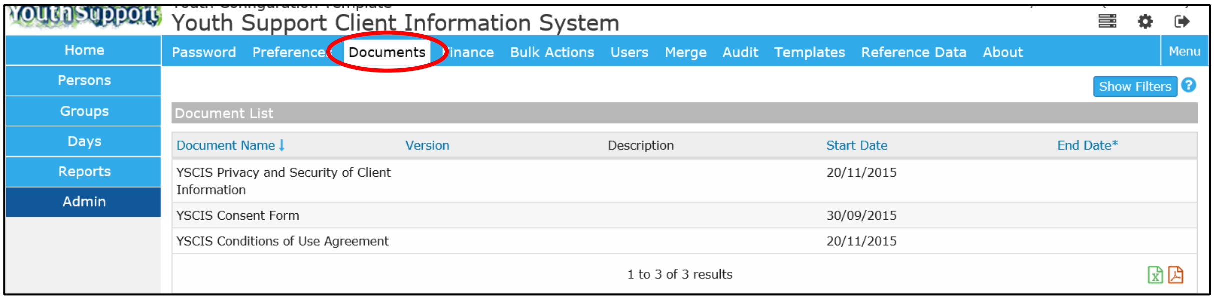
Details such as **Title**, **Position** and **Phone** may be used in some of the mail merge functions within YSCIS. The **Email address** is also used to send Microsoft calendar requests when creating Tasks.

The **Email Address** and **Security** question are mandatory.



17.3 Documents

The **Documents** tab within the **Admin** page provides access to a general reference documents for the Youth Support Program.



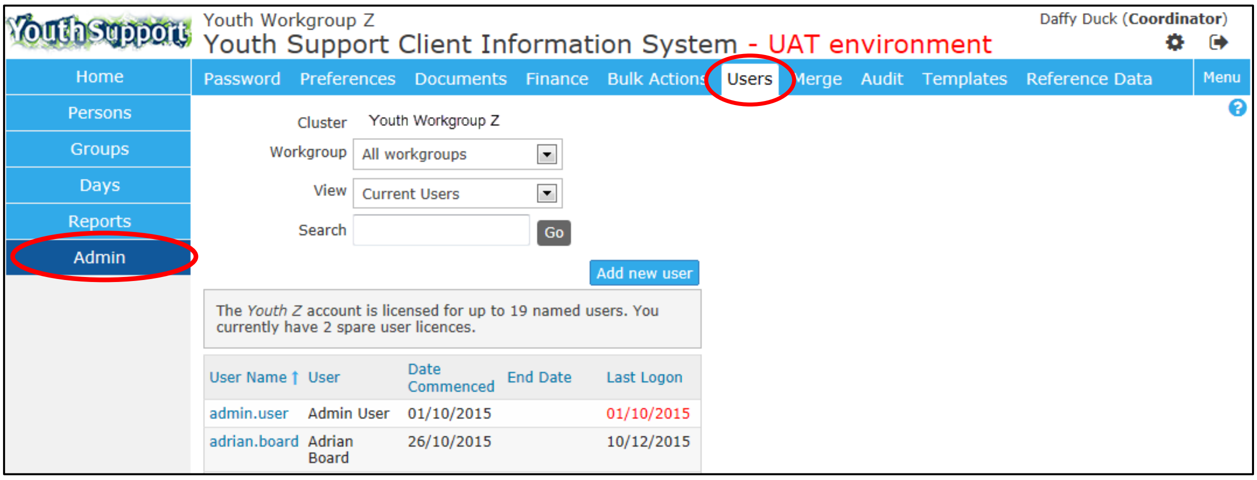
The documents within the **Documents** tab can be accessed and printed by clicking on the **Document Name**.

18 Coordinator Functions

The administrative functions detailed within YSCIS are only available to users with **Coordinator** access level.

18.1 User Administration

The **Users** tab within the **Admin** page provides access to the User Administration functions.



18.1.1 Creating a New User

There are 4 steps required to create a new User in YSCIS, detailed below.

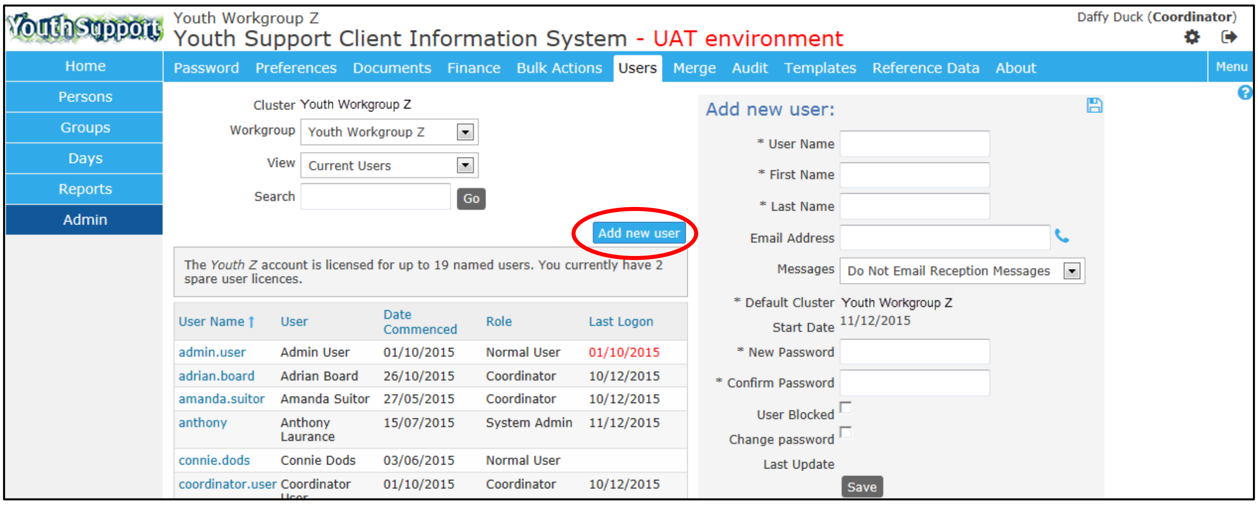
Step 1: Check for a spare licence

YSCIS licences have been allocated to your service outlet (Workgroup) by the Youth Support Program Team in alignment with your agreement. Your allocation of licences is referred to in YSCIS as the total number of *named users*. When a user is allocated to a Workgroup, the number of spare licences for that Workgroup is reduced by one.

In the screenshot above, Youth Workgroup Z has 19 named users and currently has 2 spare licences. This means there are currently 17 users allocated to Youth Workgroup Z.

Step 2: To create a new User

Click **Add new user** button and the Add new user form will open to the right of screen.



Enter the new **User Name** (User id). Please note that:

- The **User Name** is case sensitive.
- It is recommended that the naming convention of 'Firstname.Lastname' be followed. For example, if the user's name is John Smith, the new **User Name** should be 'John.Smith'.
- The **User Name** can consist of letters, numbers, and the '-'(dash) and the '.' (dot) characters. No other characters or symbols are permitted.

Enter the **First Name** and **Last Name**.

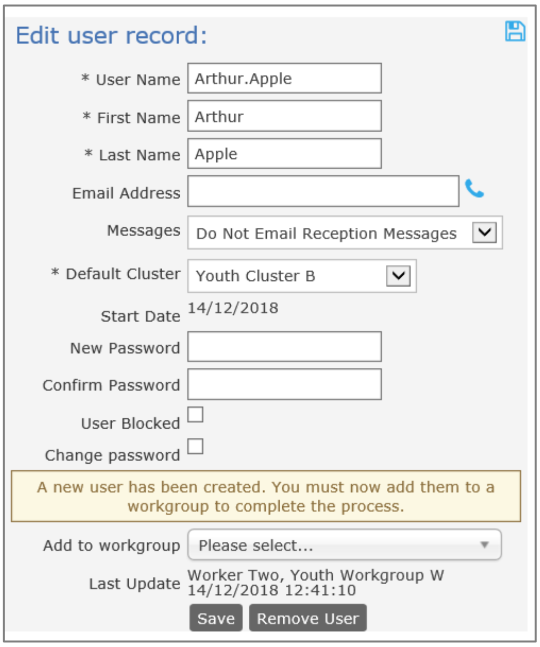
Enter the **New Password** and re-enter the password in **Confirm Password**. The password must be at least eight characters in length and contain both letters and numbers.

Ensure that the **User Blocked** checkbox is not ticked.

Tick the **Change Password** checkbox, this will force the user to change their password when they first log into the application.

Click **Save**.

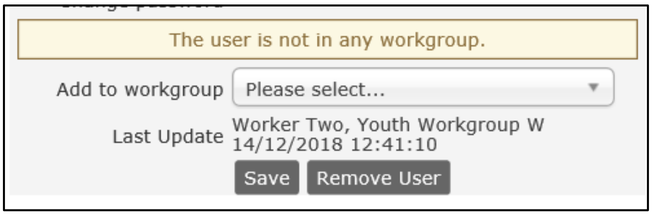
The User account has been saved – you will see the yellow notice advising that the user has not been allocated to any Workgroup.

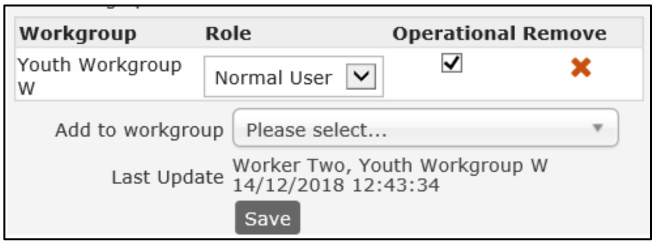


A user is not able to log in to YSCIS until they have been allocated to a workgroup. Until they are allocated to a Workgroup, they are not using one of the licences.

Step 3: To allocate to a workgroup

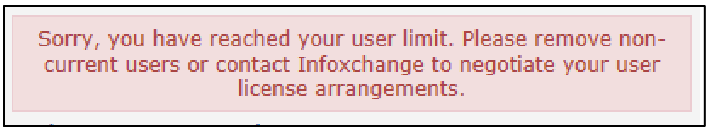
To allocate access to a Workgroup, make a selection from **Add to workgroup** list (highlighted below) and click **Save**.





Additional Notes:

» If you did not have a spare licence, it is at this point, when you attempt to allocate a user to Workgroup, that you will receive the following error at the top of the form.

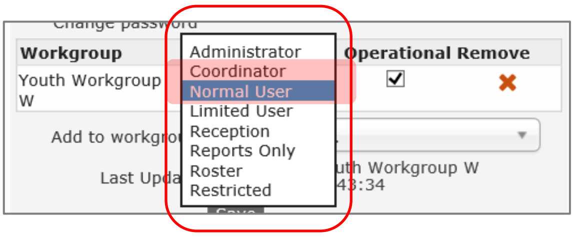


Please contact the Youth Support Program Team to discuss your requirements.

Step 4: To allocate access level

The access level for the Workgroup will default to ‘Normal User’.
Managers and team leaders should be given ‘Coordinator’ access level.

Note: Only **Normal User** or **Coordinator** role values are applicable for YSCIS.



Note: If the user is a manager who is not an ‘operational’ member of the workgroup, uncheck the **Operational** check box so that their **User Name** does not appear in the ‘worker’ drop down lists throughout YSCIS. For the majority of users, this should remain checked.

The difference between Normal User and Coordinator access is illustrated in the following table:

Function	Normal	Coordinator
Manage Enquiries	✓	✓
Create Client/ Person	✓	✓
Create Profile/ Case	✓	✓
Manage Case (notes, payments, consent, plans, documents, etc.)	✓	✓
Delete notes, payments, plans, etc.	✗	✓
Delete Profile/ Case	✓	✓
Create/ Manage Referrals	✓	✓
Create / Manage Groups	✓	✓
Performance reporting – basic	✓	✓
Performance reporting – advanced	✗	✓
Merge Clients/ Persons	✗	✓
Auditing	✗	✓
Perform Brokerage reporting	✗	✓
Manage document templates	✗	✓
Manage Users	✗	✓

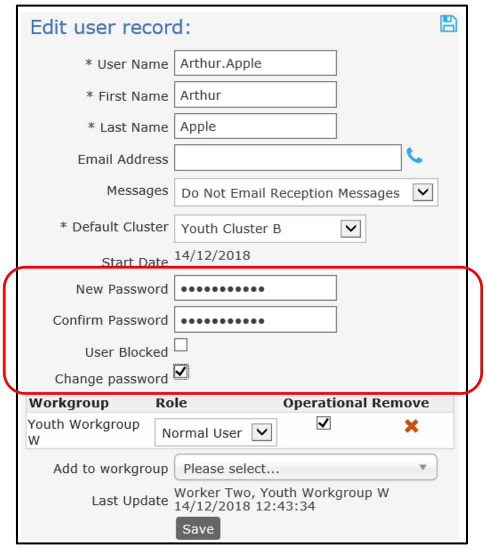
18.1.2 Resetting a Password

To reset a user's password:

1. Open the **Edit user record** form by selecting the User Name from the list on the left of screen.

2. Enter the **New Password** and re-enter the password in **Confirm Password**.

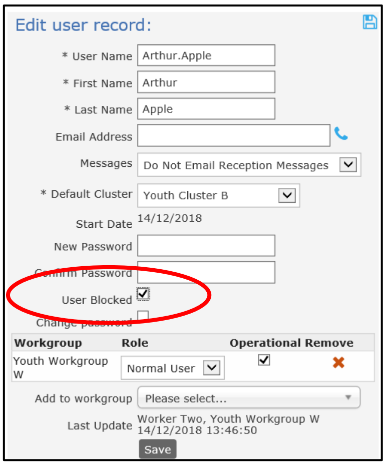
3. Tick the **Change Password** checkbox (highlighted above) which will force the user to change their password the next time they log into the application.



4. Click **Save**
   The user will be required to set their own password when they log in.

18.1.3 Unblocking a User Account

A user account may become blocked due to a number of consecutive incorrect password attempts or by lengthy account inactivity.



Simply uncheck the **User Blocked** check box (highlighted above) and click **Save**. The user will now be able to log in.

18.1.4 Removing User Access

When a staff member leaves your organisation, you have a choice as to how you manage their User record within YSCIS.

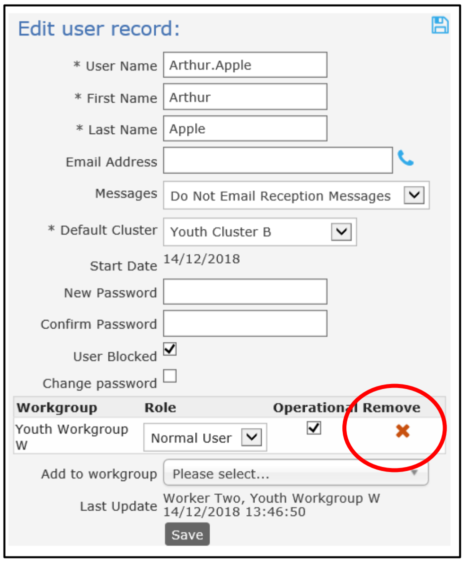
As outlined below, the first step to remove the User will cancel the licence allocated to their record and their name will remain the User list in the Users tab (on the Admin page).

A subsequent step to **Remove User** will clear their name from the User List. Both of these actions retain the User's name against all records they completed in YSCIS e.g. Case notes.

If you have a high turnover of Users, then choosing to remove them from the User List may be beneficial in keeping the List more manageable.

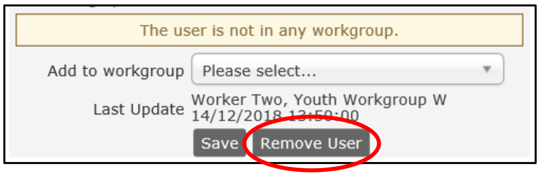
To remove the active user account:

1. Open the **Edit user record** form for the user account.



2. Click the **Remove** cross (highlighted above), then click **Save**.

3. The following message will appear:



Once a user has been removed from a workgroup, they are unable to log in. They will remain on the list of Current users on **Users** tab but they won't count towards the number of licences used.

4. To more easily manage users, click the **Remove User** button (highlighted above).

The user account will be removed as a current user - all database references to the user will be retained. For example, association with case notes.

If you want to temporarily suspend access for a user, tick the **User Blocked** check box. The user will not be able to log in to YSCIS.

18.2 Merging Person Records

The **Merge** tab on the **Admin** page allows you to merge duplicate person records for the same client. For example, two workers may have individually entered client details and one record is incorrect. (The **Merge** tab is only available to users with the YSCIS Coordinator access level.)

Prior to commencing the merge process, you should identify the 'primary' person record you want to keep and the 'secondary' person record you want to merge into the primary person record. When you merge the two person records, the demographic information will be retained for the primary person record but the demographic information contained in the secondary person record will be deleted.

18.2.1 To Merge Two Person Records

Please note that you will be unable to merge two records that contain Profiles/Cases with overlapping dates. To resolve this conflict, you can either delete one Profile/Case (if created in error) or alter the dates of the Profile prior to the merge process.

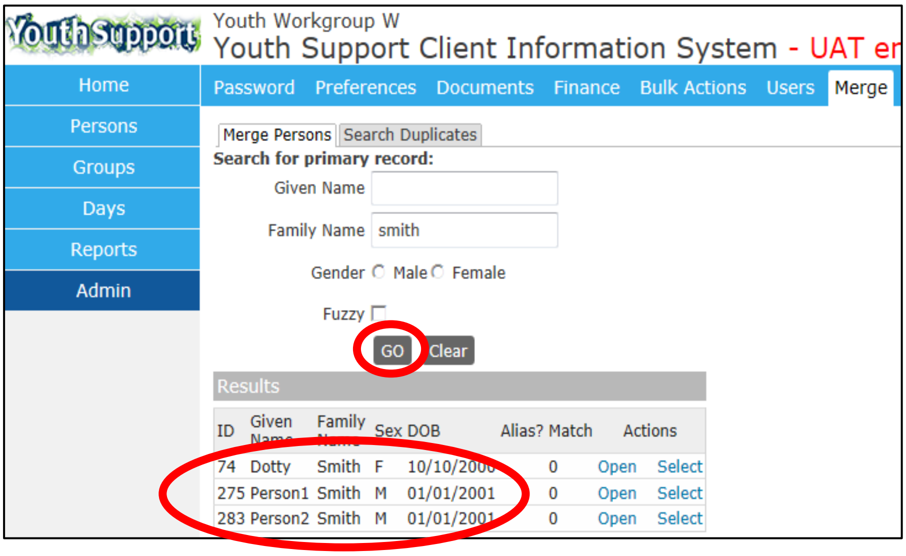
1. Click the **Merge** tab. The Search for primary record form will appear in the top left of the screen and the Search for secondary record form will appear in the top right of the screen.

2. In the **Search for primary record** form, enter the **First Name** and/or **Last Name** of the primary person record. It is also recommended to click the **Fuzzy** search check box to display partial matches and to allow for incorrect spelling.

3. Click **GO** and a list of possible primary person records will be displayed.

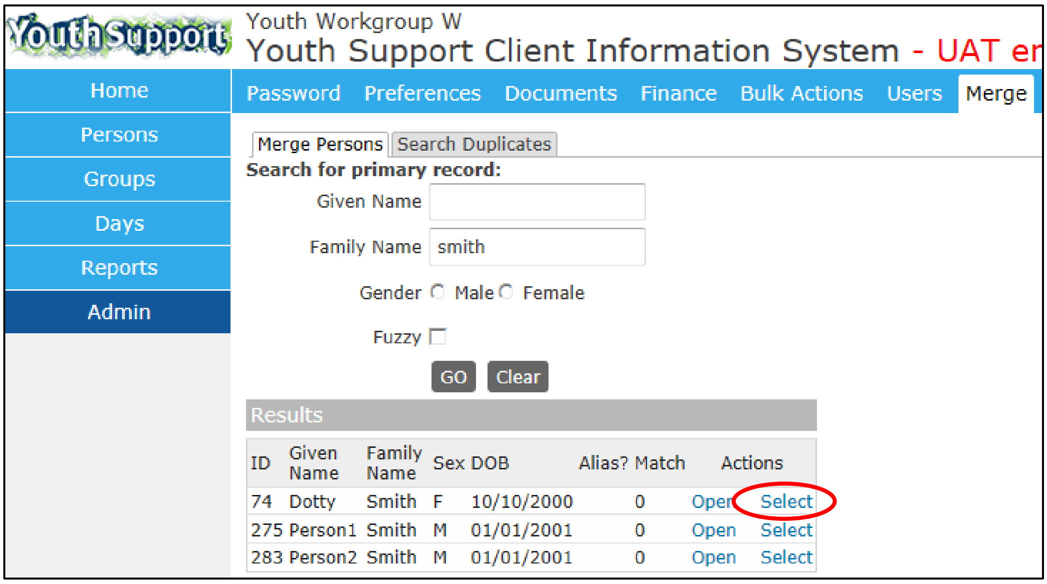
4. If the records have the exact same client name, you can verify the primary and secondary record according to the Person ID, the unique system number for each person record.

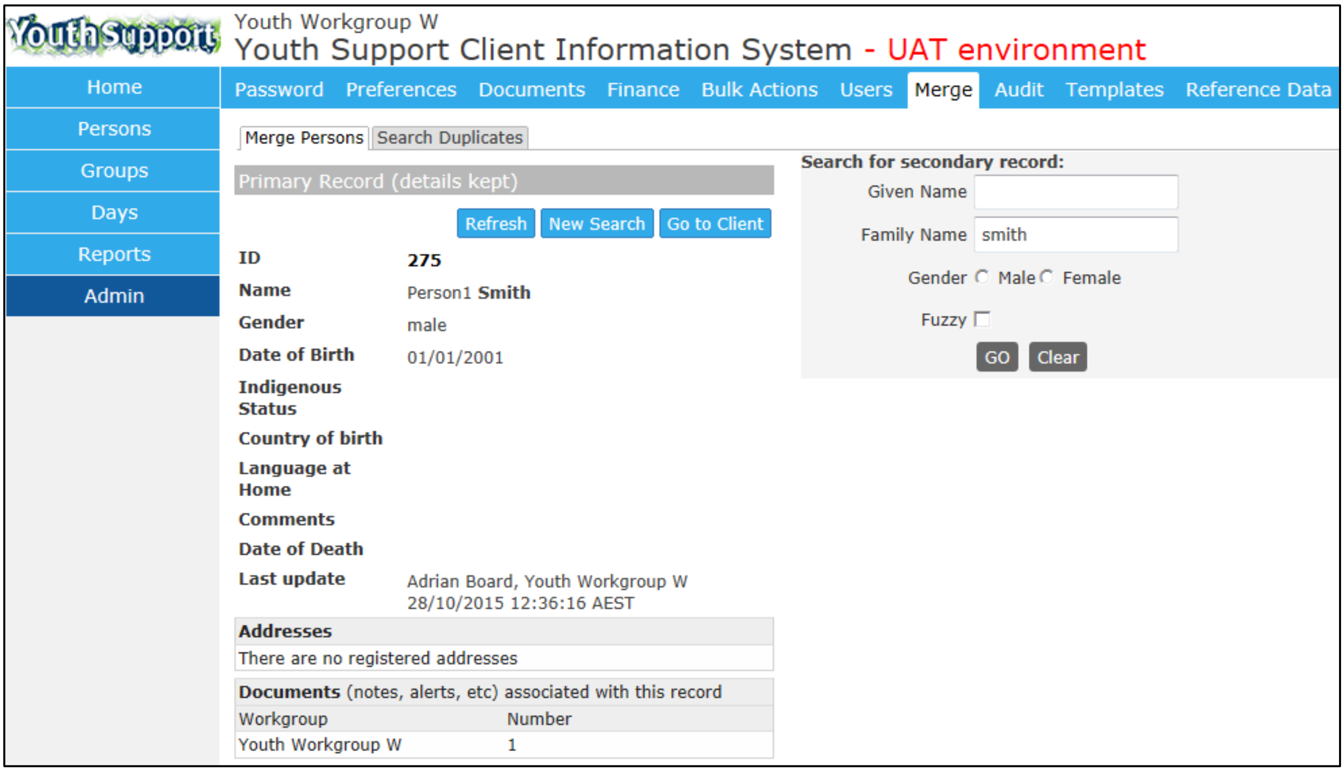
Note: You can obtain the **Person ID** by holding the mouse over the client's name in the Person **Details** tab (see image below). The first number is the Person ID, the second number (if different) is the alias record ID. In the example below, the **Person ID** is '157' and the **Alias ID** is '157'.



5. When viewing the Primary person record search results on the Merge tab, you can view the Person Details tab for the selected person record by clicking **Open**. Note that the Person Details tab will open in a new browser tab.

6. Click **Select** to confirm the primary person record for the merge process. This is the record that will be kept.

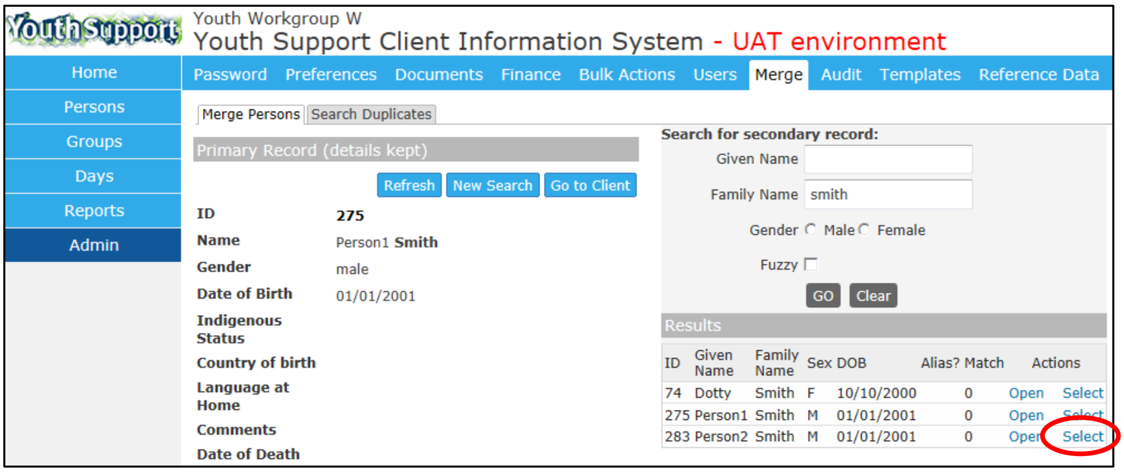




7. Once you click **Select**, details for the selected person record will be displayed on the left side of the screen with the 'Primary Record (details kept) heading.

If you need to modify any details on the primary person record, you can click the **Go to Client** button (see image above) to open the client's Person Details tab in another browser tab. Once you have saved any changes in the Person Details tab, switch back to the current Merge process and click the **Refresh** button to update the primary person record information.

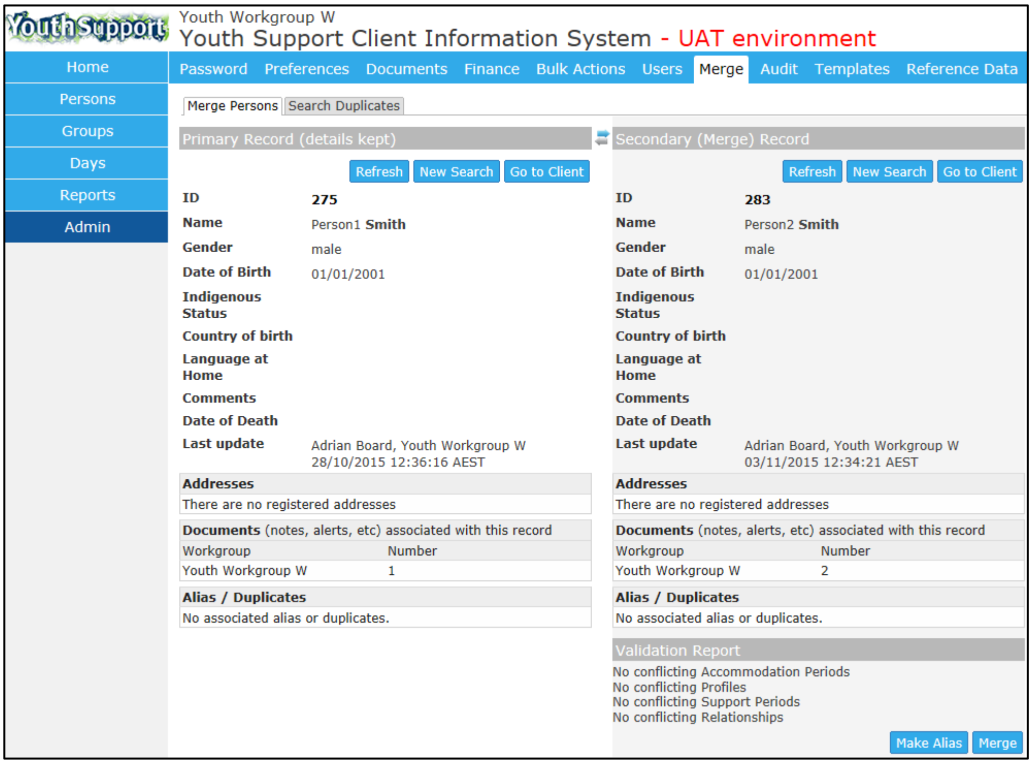
8. In the **Search for secondary record** form, enter the **First Name** and/or **Last Name** of the secondary person record. These fields will have been defaulted from the search criteria entered in the primary search criteria. It is also recommended to click the **Fuzzy** search check box to display partial matches and to allow for incorrect spelling.



9. Click **GO** and a list of possible secondary person records will be displayed.

10. If you want to view the Person Details tab for the selected secondary person record, click **Open**. Note that the Person Details tab will open in a new browser tab.

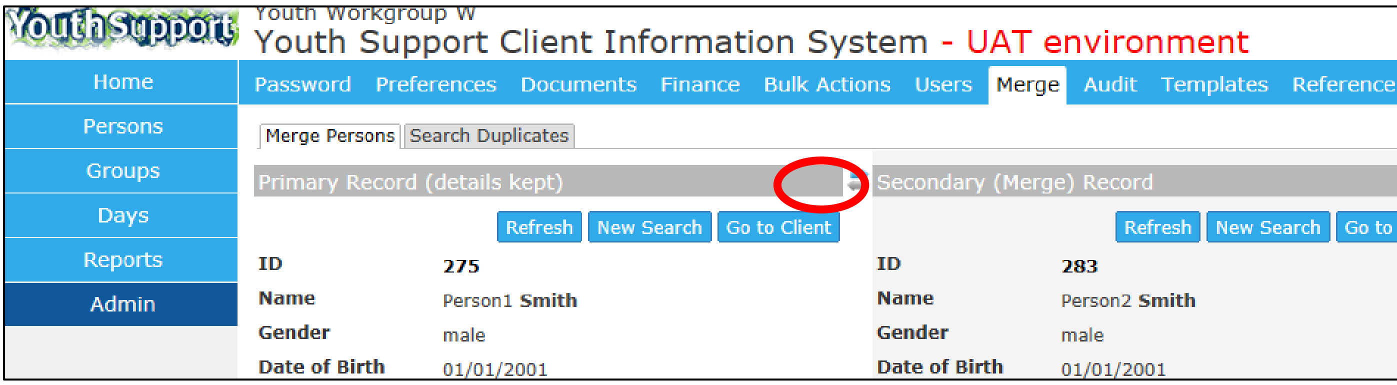
11. Click **Select** to confirm the secondary person record for the merge process. This is the record that will be merged into the primary person record.



12. If you need to modify any details on the secondary person record, you can click the **Go to Client** button (see image above) to open the client's Person Details tab in another browser tab. Once you have saved any changes in the Person Details tab, switch back to the current Merge process and click the **Refresh** button to update the secondary person record information.

13. Carefully consider both records to ensure they relate to the same client before clicking **Merge**. Note that, in addition to merging the records, clicking **Make Alias** will also create an Alias record from the name and gender details of the secondary person record. For example, the **Make Alias** function would be used if you were merging two records where the person is known under different names (hence the accidental creation of a duplicate record for the person).

14. If you decide that you want to keep the Secondary person record and merge the Primary person record, you can swap the two records by clicking on the arrow icon between the Primary and Secondary forms.(See image below)

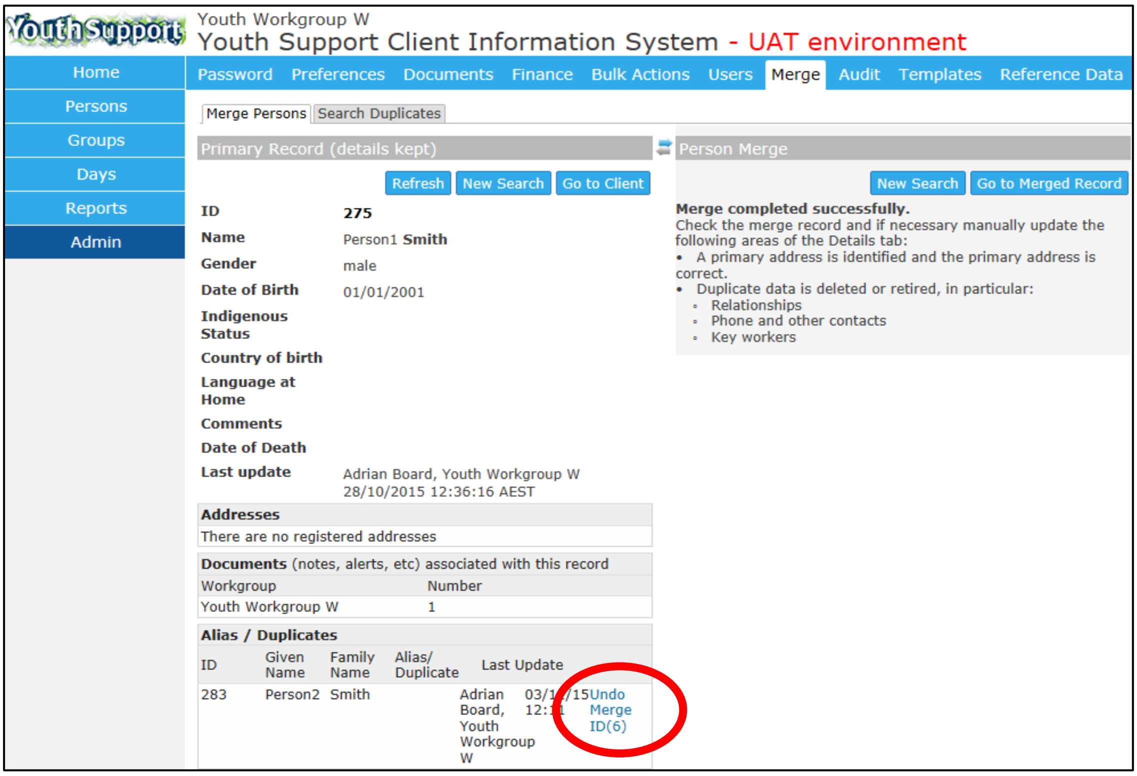


15. Click **Merge** to merge the secondary person record into the primary person record. (Please note that if the **Merge** button is not available, this will most likely be due to conflicting support period, accommodation records or profiles between the selected primary and secondary person records.)

16. If you are sure you want to merge the records, click **OK** to confirm the merge. Once the merge process has been completed, a confirmation message will be displayed in the top right corner of the screen (see image below) indicating that the merge process was successful.

18.2.2 Reinstating Merged Records (Undo Merge)

After two Person records have been merged, you will be able to undo the merge process at a later date by first locating the person record via the **Search for primary record** form and then clicking the blue **Undo Merge** link (highlighted in image above).

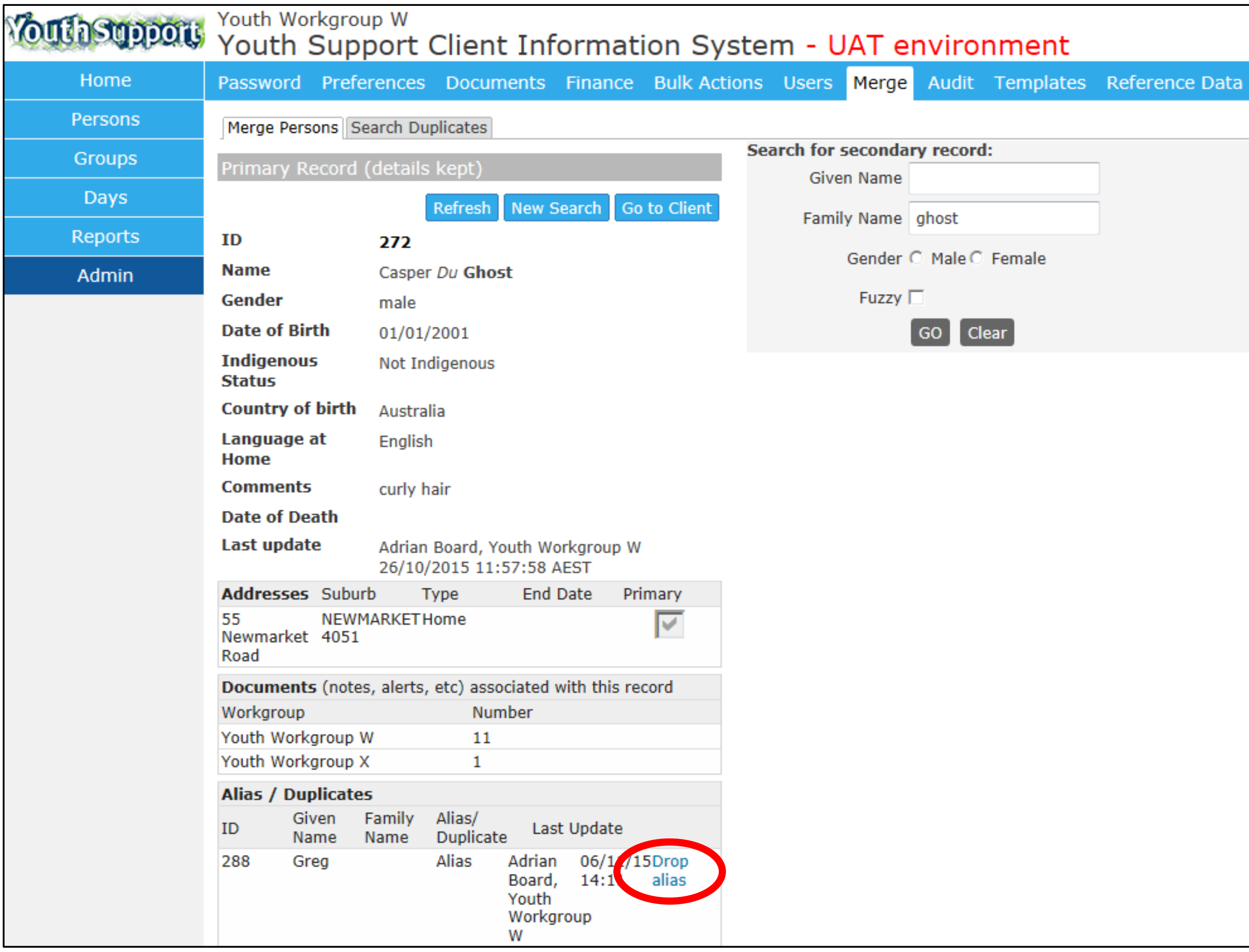


YSCIS will remember what records have been merged and will separate the records back into the original two person records. Please note that any new data/records attached to the person record after the merge process will stay with the primary person record if the merged records are unmerged at a later date.

18.2.3 Deleting an Alias Record

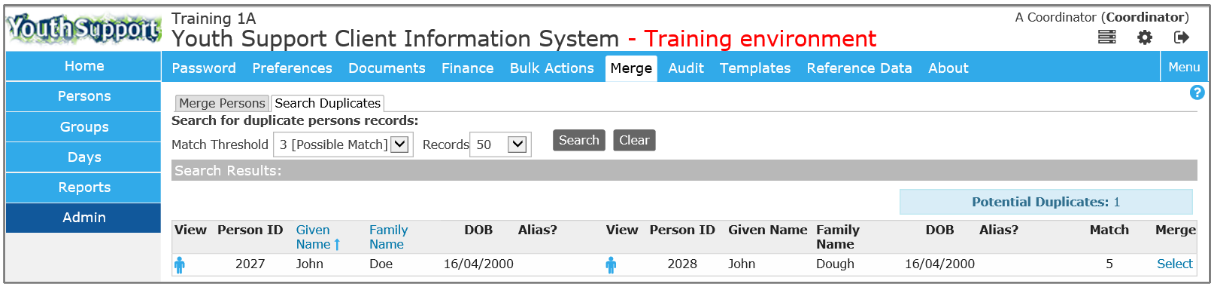
If an alias record has been entered in error, it can be deleted via the Merge tab.

Locating the required person record via the **Search for primary record** form will list the person details including any current alias information. Clicking the blue **Drop Alias** link (highlighted in image below) will allow you to delete the alias record that has been incorrectly entered or is no longer valid.



18.2.4 Possible Duplicate Person Search

Coordinators have access to the **Search Duplicates** function on the **Merge** tab. This function will identify possible duplicate person records based on the Given Name, Family Name and Date of Birth fields.



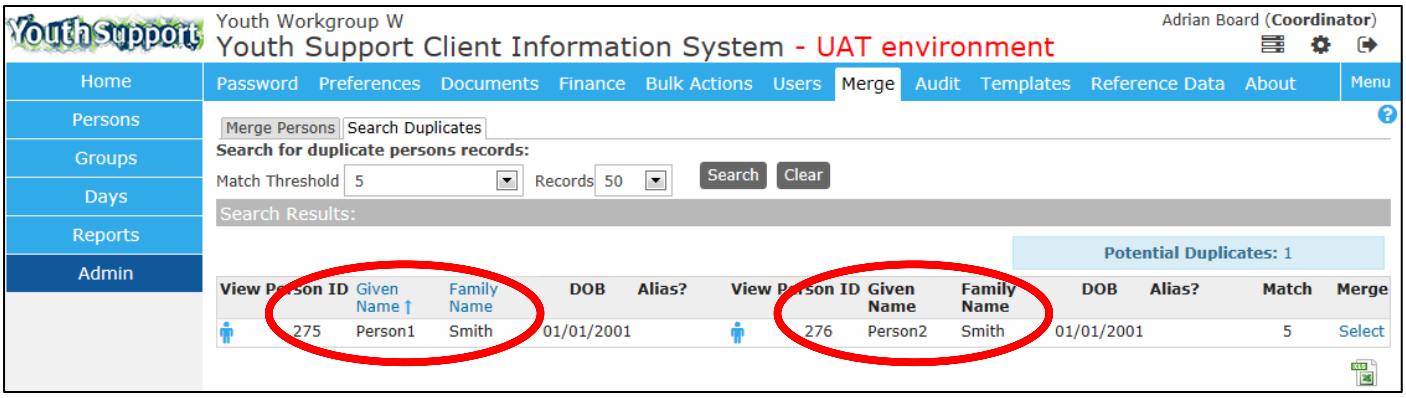
The **Match Threshold** field (highlighted above) indicates the number of matching ‘points’ the person records need to meet before they are selected and listed as possible duplicates. Matching occurs on the Given Name, Family Name and Date of Birth fields. Fuzzy name matching is also taken into consideration. One Match Threshold point is allocated for a match on each of the name fields (or fuzzy name matching) and two Match Threshold points are allocated for a match on the Date of Birth. A Match Threshold of 6 is an exact match on both the name fields and the Date of Birth. A lower Match Threshold figure allows for less exact matches to be displayed as potential duplicates.

The **Records** field indicates the maximum number of possible matches you would like returned for review.

To perform the possible duplicates search:

1. Select the required **Match Threshold** and **Records**. Select a lower **Match Threshold** to allow a less exact match.

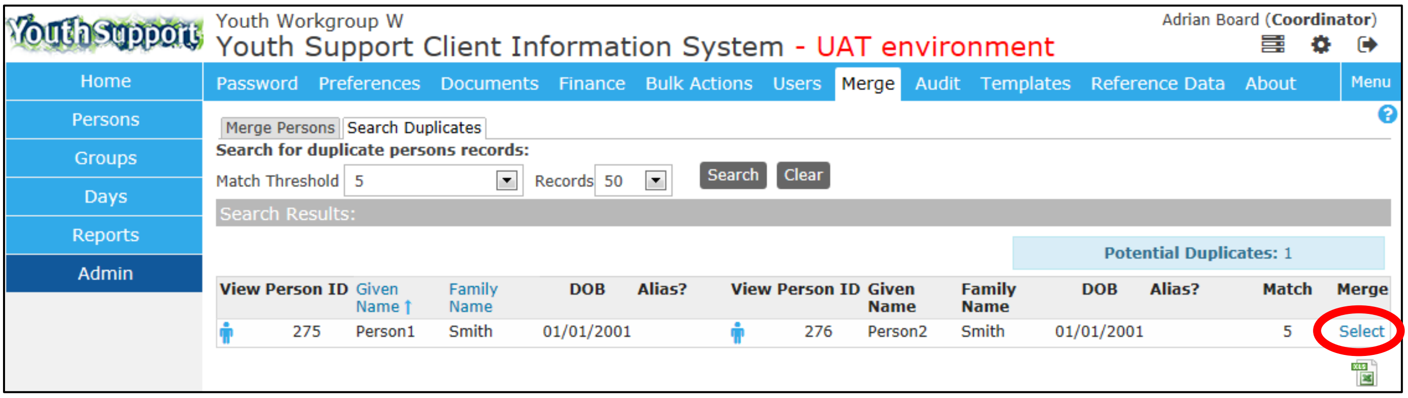
2. Click **Search** to perform the possible duplicates search. Any possible duplicate person records will be displayed.



3. The results are presented with the two possible duplicate person records listed in the same row. The first person record detail is displayed on the left (see image above) and the second person record detail is displayed in the centre. The number of matched ‘points’ between the two records is displayed on the right in the **Match** column.

4. Click on the person icon to open the **Person** page, **Details** tab for that person record in a new browser tab. You will then be able to easily navigate back to the possible duplicates list.

5. If you would like to merge the two suggested possible duplicate person records, click the blue **Select** link (see image below) to automatically populate the Merge Persons tab with the selected records.



Additional Notes:

- The list of possible duplicate person records can be exported to Excel by clicking the Export to Excel icon at the bottom of the list.
- If you have a larger number of possible duplicate records returned, increase the **Match Threshold** to a higher level (such as 6 – exact match) to make it easier to identify the more likely duplicate records so that these can be reviewed first.

18.3 Bulk Actions

This is standard functionality from the Infoxchange SRS product. For guidance on using this feature, click on the Help icon to access SRS Help or review the SRS product user guides at the following url: http://srs-support.infoxchangeapps.net.au/user-guides

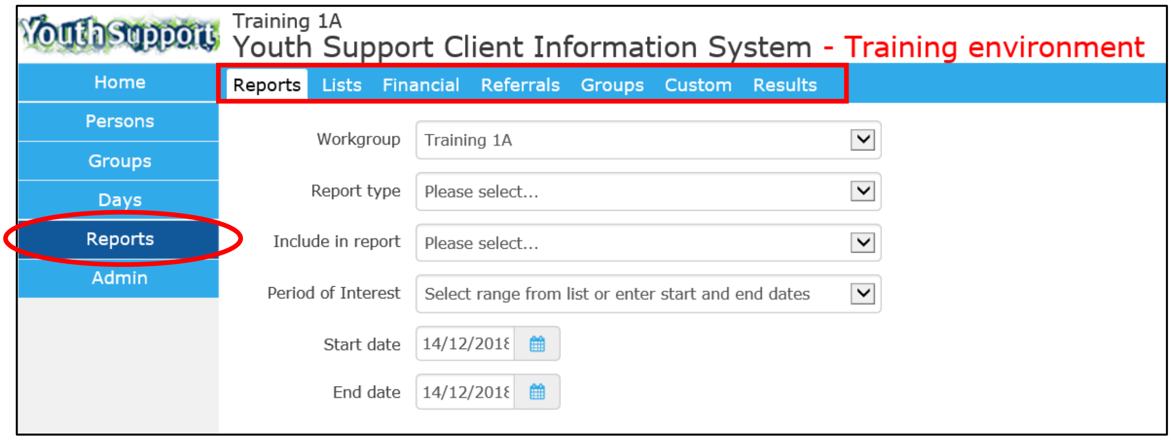
18.4 Document Templates

This is standard functionality from the Infoxchange SRS product. For guidance on using this feature, click on the Help icon to access SRS Help or review the SRS product user guides at the following url: http://srs-support.infoxchangeapps.net.au/user-guides

19 Reports Page

Youth Support Client Information System (YSCIS) includes a report engine that enables you to generate a variety of aggregated reports and data lists to assist with organisational management and reporting to stakeholders.

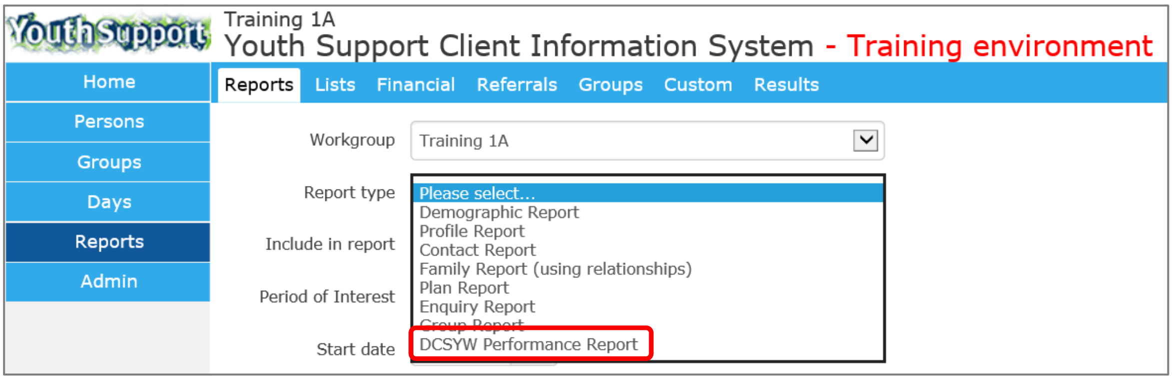
There are a number of distinct tabs within the **Reports** Page identifying the different report categories: **Reports**, **Lists**, **Financial**, **Referrals**, **Groups**, **Custom** and **Results**.



19.1 Reporting options available

19.1.1 Reports tab

On the **Reports** page, **Reports** tab, you can generate a number of reports.



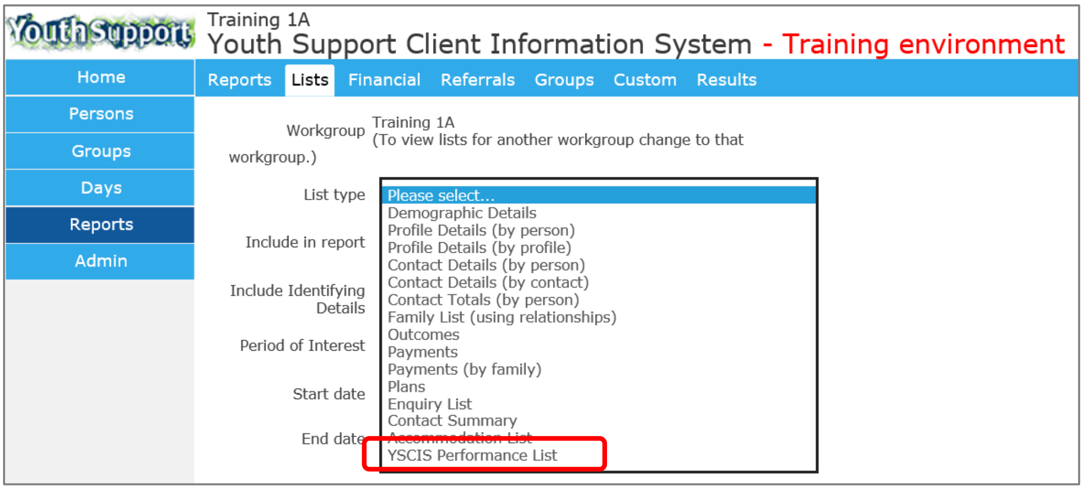
The *Demographic, Profile, Contact, Family, Plan, Enquiry* and *Group* reports are generic to the SRS product.

The **DCSYW Performance Report** (and the corresponding **DCSYW Performance List**, accessed from the **Lists** tab) has been specifically developed for Youth Support services to assist in managing your service and streamline reporting requirements.

The **DCSYW Performance Report** reflects the results for the performance measures for your service based on a defined reporting period, streamlining reporting obligations to be entered into the Online Acquittal Support Information System (OASIS).

19.1.2 Lists tab

The **Lists** tab provides details of the individual records that are reflected in the corresponding report. The List can be exported to excel, enabling you to format and analyse the data as you require.



As mentioned above, the **DCSYW Performance List** has been specifically developed to provide the individual records for each of the measure results reflected in the corresponding **DCSYW Performance Report**.

Managers are encouraged to run the **DCSYW Performance Report** and the **DCSYW Performance List** at the same time (for the same time period) to assist in their review and management of the service.

The other List types available are generic to the Infoxchange SRS product. Service managers need to assess the use of these for their own circumstances.

19.1.3 DCSYW Performance Report & DCSYW Performance List

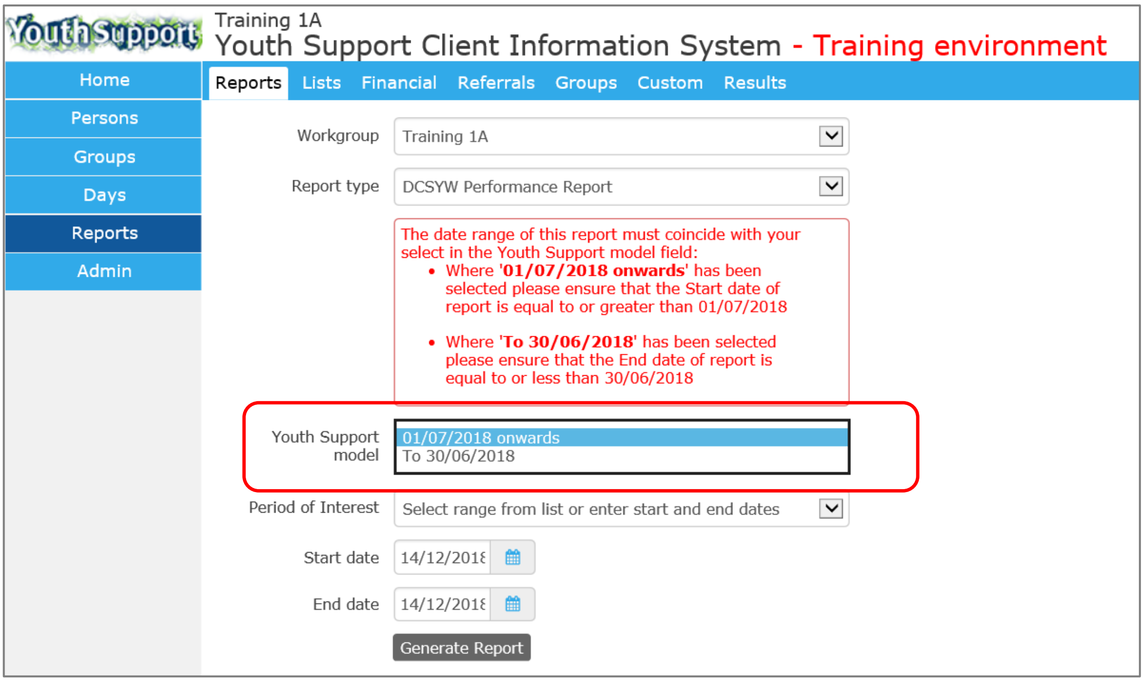
Effective 1st July 2018, the Youth Support model was changed to:

- Expand the age range for young people to 8-21yrs
- Merge the *Support* and *Integrated Response* service types into a single case management category of *Support – Case Management*.

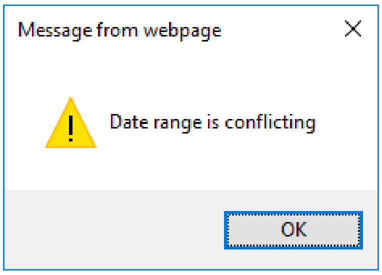
To accommodate this, the following message will appear when the **DCSYW Performance Report** (on the Reports tab) and the **DCSYW Performance List** (on the Lists tab) are requested:

The date range of this report must coincide with your selection in the Youth Support Model field below:

- Where '**01/07/2018 onwards**' has been selected please ensure that the Start date of report is equal to or greater than 01/07/2018
- Where '**To 30/06/2018**' has been selected please ensure that the End date of report is equal to or less than 30/06/2018

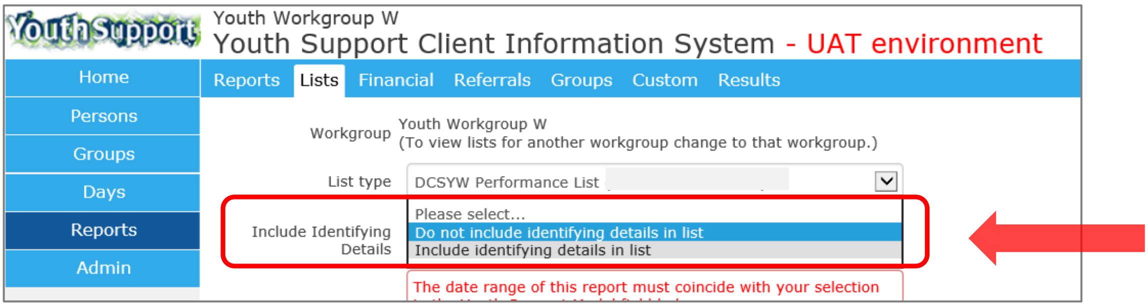


If you select a reporting period that includes pre- and post- 1st July 2018 dates, the following warning will display:



Note: *Support* and *Integrated Response* Cases will be included in the **DCSYW Performance Report** for reporting periods from 1st July 2018 as *Support – Case management*.

Note: When running the **DCSYW Performance List**, be sure to select *Include identifying detail in list* (otherwise, client names will not display).



The counting rules defined for each of the performance measures are provided in the following table:

Measure No.	Measure Name	Service Type Code	Service Type Name	Counting Rule
GM07	Number of Service Users who had their case plans closed/finalised as a result of majority of needs being met	T314	Support - Case Management	Count of **Support – Case Management** cases closed within the reporting period with a *Reason for exit* of 'Majority of needs/plan goals met'
IS35	Number of users identifying as Aboriginal and/or Torres Strait Islander	T103 T314	Access - Information, Advice and Referral Support – Case Management	Count 1 for each individual unique case (Service User + case type) active* within the reporting period, who identifies as being of Aboriginal and/or Torres Strait Islander descent.
IS39	Number of Service Users identifying as being from a culturally and linguistically diverse background	T103 T314	Access - Information, Advice and Referral Support – Case Management	Count 1 for each individual unique case (Service User + case type) active* within the reporting period, who identifies as being from a culturally and linguistically diverse background.
IS131	Number of case panels coordinated	T314	Support – Case management	Count number of **Notes** created within the specified reporting period (for Support – Case management cases) where Contact type = *Case Panel Meeting* and 'Did 2 or more organisations attend?" is set to 'Yes'.
IS142	Number of Service Users receiving brokerage	T103 T314	Access - Information, Advice and Referral Support - Case Management	Count number of **Cases** that received brokerage within the specified reporting period.
IS145	Number of Service Users who exited the Service	T314	Support - Case Management	Count of number of **Support – Case management** cases closed within the reporting period.

Measure No.	Measure Name	Service Type Code	Service Type Name	Counting Rule
IS147	Number of Service Users who received a service during the reporting period	T103	Access - Information, Advice and Referral	Count number of **Access** Cases created during the reporting period AND count number of **Enquiries** created during the reporting period where the service user is 'Client eligible for Access Case but no case required'
IS147	Number of Service Users who received a service during the reporting period	T314	Support - Case Management	Count number of **Support – Case management** Cases created during the reporting period
IS148	Number of Service Users who were referred to an external service	T103	Access - Information, Advice and Referral	Count number of Service Users with Access cases where **Referral** is recorded during the reporting period with Referral type = 'External' AND count number of **Enquiries** created during the reporting period where the service user is flagged as 'Client Eligible for Access Case but no case required' <u>and</u> Referral type is 'External'
IS148	Number of Service Users who were referred to an external service	T314	Support - Case Management	Count number of Service Users with Support – Case management case, where **Referral** is recorded during the reporting period with Referral type = 'External'
IS149	Number of Service Users who were referred to an internal service	T103	Access - Information, Advice and Referral	Count number of Service Users with Access Case where Referral is recorded during the reporting period with Referral type = 'Internal within Organisation' AND count number of Enquiries created during the reporting period where the service user is flagged as 'Client Eligible for Access Case but no case required' <u>and</u> Referral type is 'Internal within Organisation'
IS149	Number of Service Users who were referred to an internal service	T314	Support - Case Management	Count number of Service Users with Support – Case management Case, where **Referral** is recorded within the reporting period with Referral type = 'Internal within Organisation'

Measure No.	Measure Name	Service Type Code	Service Type Name	Counting Rule
IS150	Number of Service Users with a new case plan developed	T314	Support - Case Management	Count number of unique Support – Management Cases where one or more case plans have been created within the specified reporting period.
IS151	Value of brokerage	T103 T314	Access - Information, Advice and Referral Support - Case Management	Sum of total brokerage for each **individual unique case** (individual service user + case type) created within the specified reporting period.
IS205	Number of female Service Users	T103 T314	Access - Information, Advice and Referral Support – Case Management	Count 1 for each individual unique case (Service User + case type), active* within the reporting period, who identifies as female
IS205	Number of male Service Users	T103 T314	Access - Information, Advice and Referral Support – Case Management	Count 1 for each individual unique case (Service User + case type), active* within the reporting period, who identifies as male
IS255	Number of Service Users who are new	T103	Access - Information, Advice and Referral	Count number of active* **Access** cases created within the specified reporting period AND Count number of **Enquiries** identified as 'Client eligible for Access Case but no case required' created within the Reporting period.
IS255	Number of Service Users who are new	T314	Support - Case Management	Count number of active* **Support – Case Management** cases created within the specified reporting

Measure No.	Measure Name	Service Type Code	Service Type Name	Counting Rule
OUTCOMES				
T103	Number of Service Users with improved ability to access appropriate services	OM2.1.05	Access - Information, Advice and Referral	Count number of active* **Access** cases within the specified reporting period AND Count number of **Enquiries** identified as 'Client eligible for Access Case but no case required' created within the reporting period.
T314	Number of Service Users with improved family interactions/connectedness	OM2.1.03	Support - Case Management	Count each unique case for **Support – Case Management** (individual service user + case type) that has more than one assessment and with one or more assessment completed within the reporting period. Compare the assessments and if the score against the most recent assessment (Review or Final) is higher than the First assessment completed for the 'My Family Relationships' Domain, then count as 1.
T314	Number of Service Users with improved quality of life	OM2.1.04	Support - Case Management	Count each unique **Support – Case Management** case that has more than one assessment and with one or more assessment completed within the reporting period. Compare the FIRST assessment with the most recent assessment completed during the reporting period and if the total score against the most recent assessment is higher than the original score against the 'Improved Quality of Life' Domain (made up of the following), then count 1: • My housing (1-5) • My schooling or work & income (1-5) • My physical health(1-5) • My drug and alcohol use (1-5) • My mental health (1-5) • My culture (if relevant) (0-5) • My disability (if relevant) (0-5) Total possible score = 35

Measure No.	Measure Name	Service Type Code	Service Type Name	Counting Rule
T314	Number of Service Users with improved life skills	OM2.1.08	Support - Case Management	Count each unique **Support – Case Management** case that has more than one assessment and with one or more assessment completed within the reporting period. Compare the FIRST assessment against the most recent assessment completed within the reporting period and if the total score against the most recent assessment is higher than the original score against the 'Improved Life Skills' Domain (made up of the following) then count 1: • My parenting and children (if relevant) (0-5) • My involvement with the law (if relevant) (0-5) • My belief in my capacity to make changes (1-5) • My social connections (1-5) • Total possible score = 20
OUTPUTS				
T103	Number of hours provided during the reporting period	A01.1.06	Access – Information, Advice and referral	Count total time of **Enquiries** created within the specified period that are identified as 'Client eligible for Access Case but no case required' AND Count total time of **Notes** for **Access** cases created within the specified period where the Contact Type DOES NOT equal 'Group Work' AND Count total time of **Group Notes** where case type = **Access** and one or more Service User is attached (marked as attending) created within the specified period

Measure No.	Measure Name	Service Type Code	Service Type Name	Counting Rule
T314	Support - Case Management	A01.2.02	Number of hours provided during the reporting period	Count total time of **Notes** created within the specified period for **Support – Case Management** Cases where the Contact Type DOES NOT equal 'Group Work' AND Count total time of Group Notes created within the specified period where case type = Support – Case management and one or more Service User is attached (marked as attending)

Note: active * = an open Case with a Note, Payment or Assessment (on Outcomes tab) record for a young person aged 8-21yrs.

IMPORTANT NOTE: Transition period

YSCIS was updated to reflect the new Youth Support model (effective from 1st July 2018) in late December 2018. During this period, services were able to select *Support* or *Integrated Response* cases for the new case category of *Support – case management*.

The ***DCSYW Performance Report*** and the ***DCSYW Performance List*** for periods commencing on and after 1st July, 2018, will include *Support* and / or *Integrated Response* cases, as relevant, in measures defined under the new Youth Support model as *Support – Case management*.

19.1.4 Financials tab

The Financial tab allows you to generate financial reports/lists based on the payment information entered into the **Payments** tab within the **Persons** page.

These are generic SRS products.

19.1.5 Referrals tab

The Referrals tab allows you to generate referral reports based on the referral information entered into the **Persons** page as well as info received via the **Home** Page, **Referrals** tab:

- Referrals sent
- Referrals received

19.1.6 Custom tab

This is standard functionality from the Infoxchange SRS product. It is generic to all SRS systems and not specific to Youth Support or YSCIS. For guidance on using this feature, click on the Help icon to access SRS Help or review the SRS product user guides at the following url: http://srs-support.infoxchangeapps.net.au/user-guides

19.1.7 Groups tab

The Groups tab allows you to generate reports for:

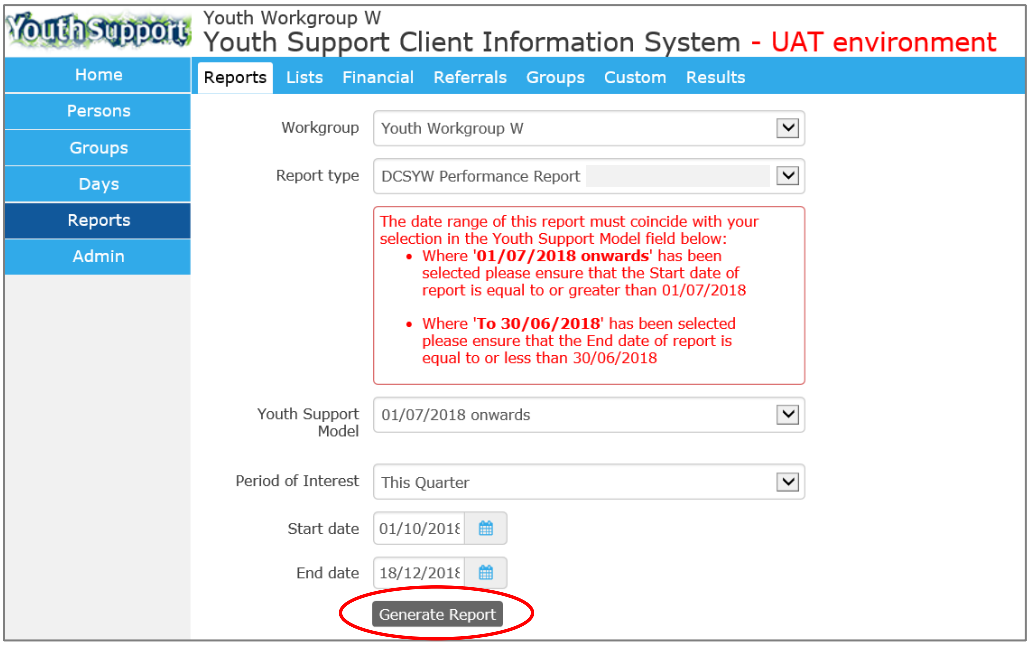
- Current groups / activities, by selecting the specific group
- Closed groups / activities, by selecting the specific group
- All groups / activities, by selecting ‘All groups’

19.2 Generating Reports

To generate reports from any of the tabs, select / define the values you require for each of the options presented.

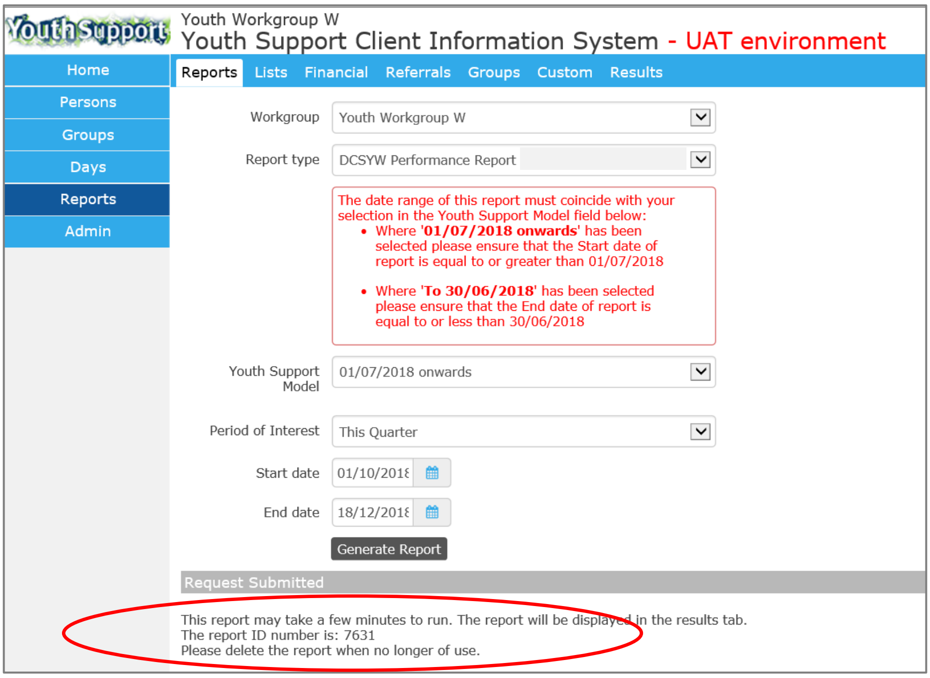
1. Select the **Workgroup** and the **Report type**.

2. Select the relevant responses to the parameters displayed.



3. Select the period your require for the report by selecting from **Period of Interest** drop-down values or set specific dates for Start and End using the calendar icons.

4. Click **Generate Report**. The following screen will be displayed.



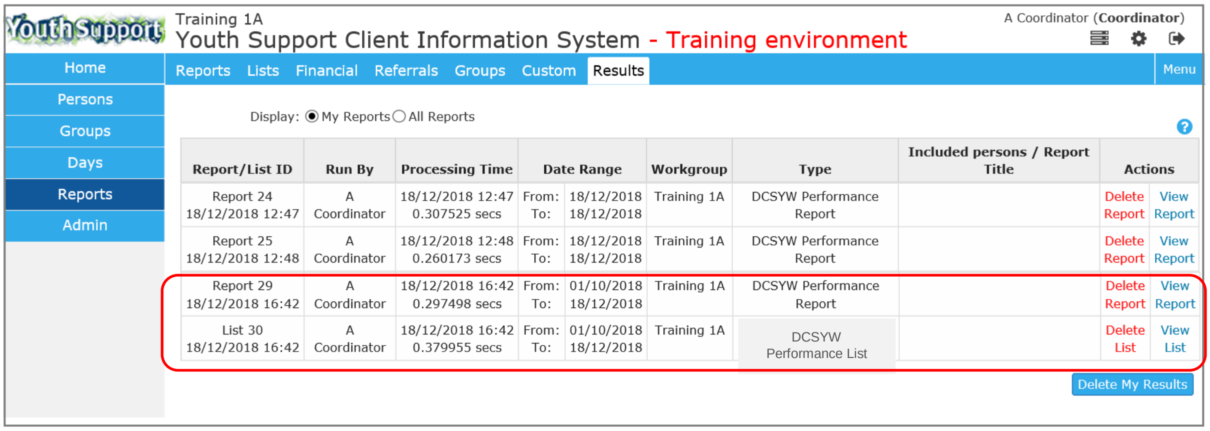
The report can be accessed from the **Results** tab using the report ID number.

19.3 Viewing Report/List Results

The **Results** tab allows you to view and delete reports and lists generated for your workgroup.

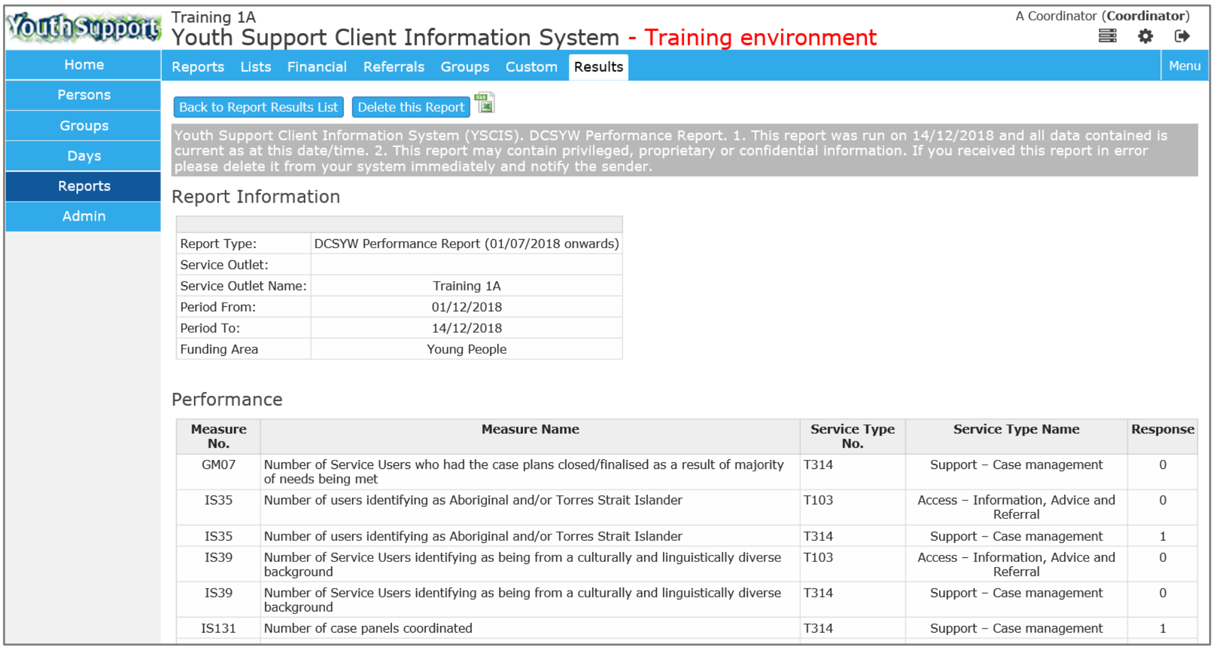
New reports are added <u>at the bottom</u> of the Results list.

Once reports are no longer needed, they should be deleted from the Results list.



19.3.1 Viewing Reports

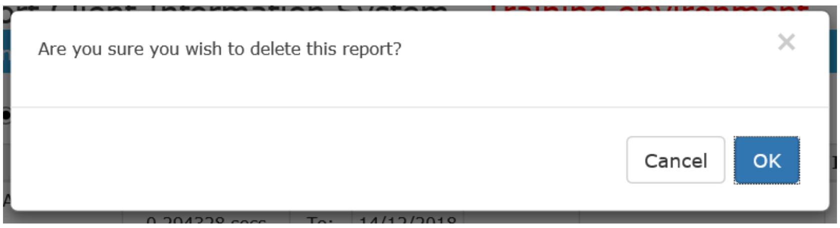
To view a report/list, click **View Report / View List**. Depending on the report type, a screen similar to that below will appear.



19.3.2 Deleting Reports

1. Click Delete Report.

2. The following message will display:

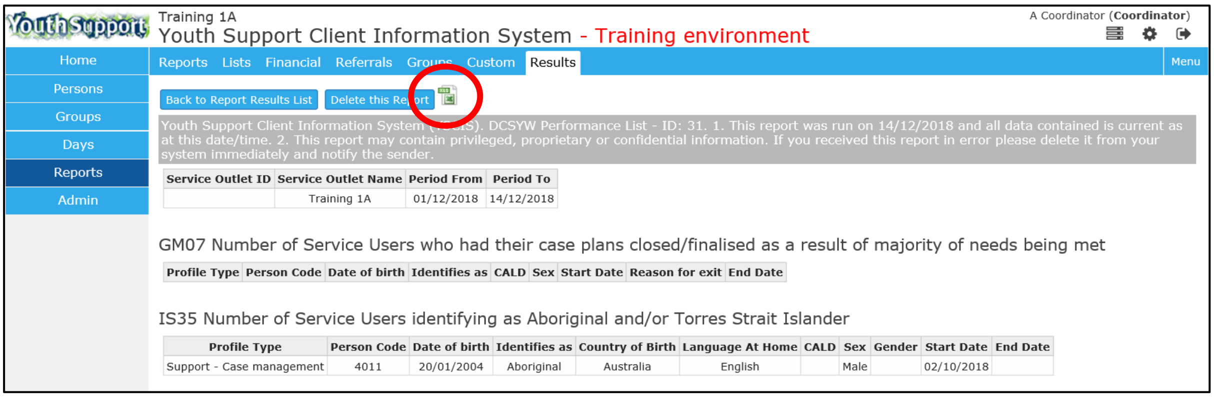


3. Click **OK** to delete the report or **Cancel** to keep the report.

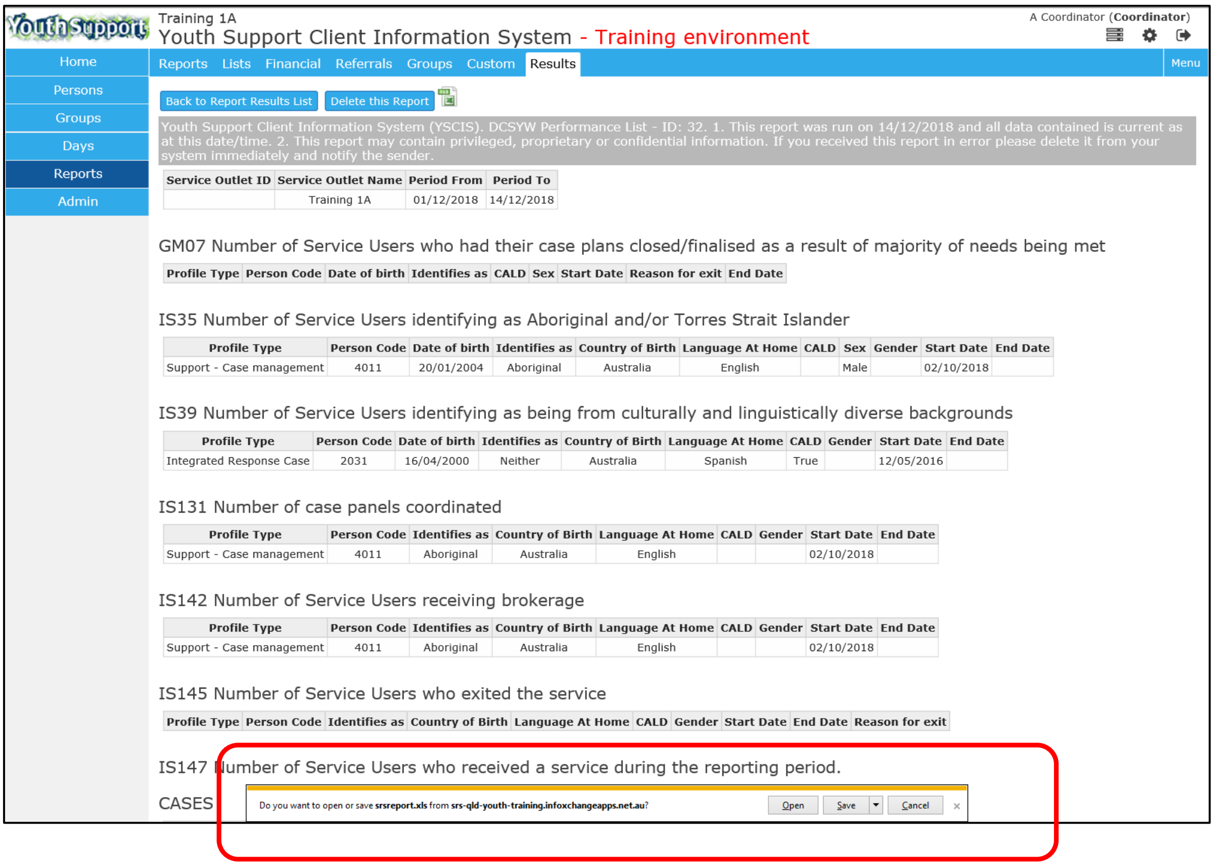
19.4 Exporting Report/List Results

Reports and Lists are able to be exported to Excel. This will enable users to perform their own analysis of the data.

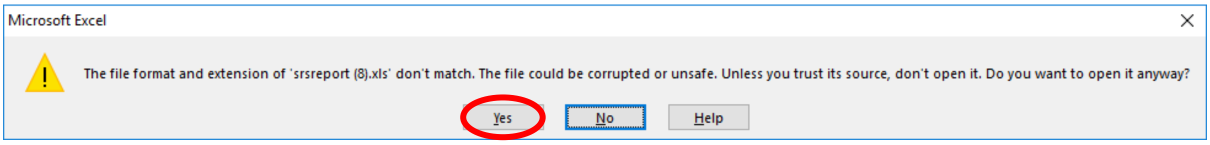
1. From the displayed results, click the **Excel**  icon



2. Select either **Open** or **Save.**

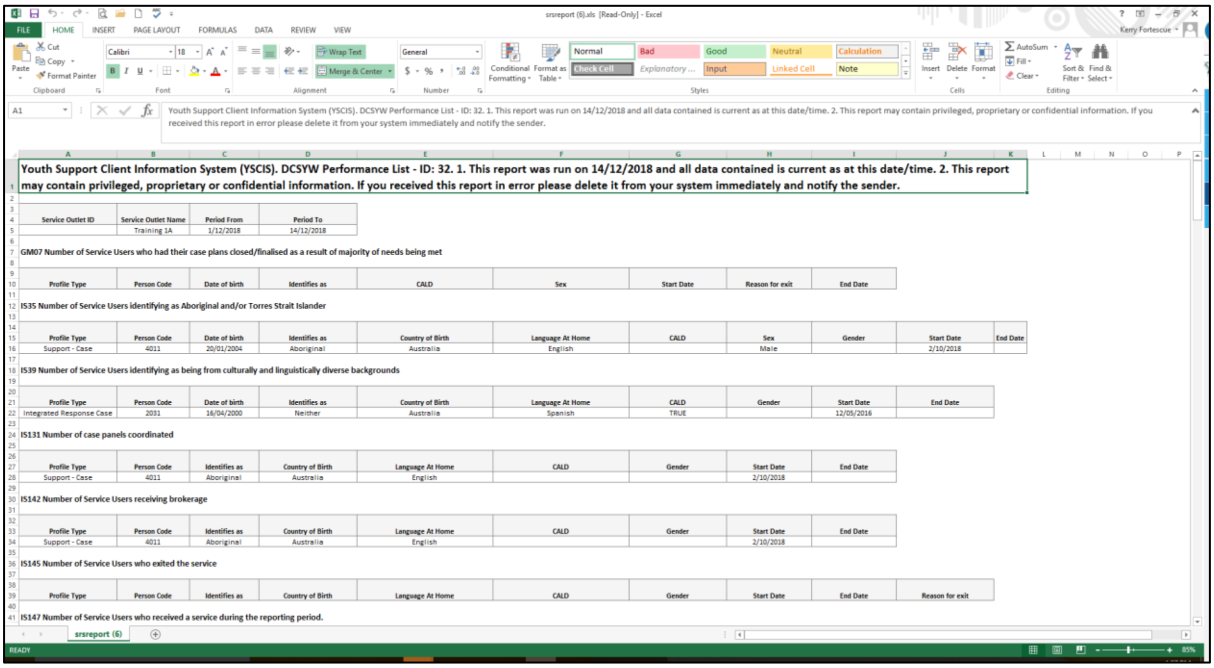


The following message is likely to appear:



Click **Yes**.

The results are displayed in Excel.



This provides you the flexibility to perform specific analysis or sorting of the available data.

20 YSCIS Support

20.1 Technical Support

Infoxchange provide a centralised helpline for users of their products. YSCIS is based on their SRS product.

If you experience any technical problems with YSCIS, please contact Infoxchange Helpline on **1300 366 516** or **(03) 9418 7487** or email srs-support@infoxchange.org

When you contact the Infoxchange Support Team, please quote the web address you use to access the application (https://srs-qld-youth.infoxchangeapps.net.au) and the workgroup that you belong to.

20.2 Online Help

The question mark icon is found throughout YSCIS. It appears under the Menu tab on every page and on edit panel. Clicking this icon will open a new tab at the online help topic, as relevant to the base SRS product) relevant to where you clicked. This information does not reflect any aspects of the application which have been specially modified for the Youth Support Program.

SRS Support is also available via the SRS Online Help website. The SRS online help also has a Frequently Asked Questions page and a feedback page where you can post a question to SRS support. **Online help is generic**.

20.3 Practice Support

For matters of practice, please refer to:

- The Practice Guide for Youth Support Services
- The Youth Wellbeing Assessment Common Assessment Tool and
- The Youth Support Frequently Asked Questions, available at:

https://www.csyw.qld.gov.au/youth/youth-support-services

Should you have any feedback regarding this User Manual or have a query that you have not been able to address using the options above, please contact the Youth Support Program Team at YouthInvest@csyw.qld.gov.au

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